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Marketing Strategies That Chinese Business Leaders Use to Increase Sales of Smartphones

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This is to certify that the doctoral study by

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Walden University
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Abstract

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Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

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Abstract

Chinese smartphone manufacturing business leaders are experiencing difficulties associated with entering into the U.S. market, partly because of U.S. government concerns that the technology could be used by the Chinese government to gather intelligence. Grounded in Rogers' diffusion of innovation theory, the purpose of this qualitative multiple case study was to explore marketing strategies Chinese smartphone marketing business leaders used to increase their smartphone sales in the United States. Data were collected from semistructured interviews and company documents from 3 Chinese smartphone marketing business leaders with successful experience in using marketing strategies to increase their smartphone sales in the United States. Yin's 5-step thematic analysis process was used to analyze the data. Four themes emerged: removing barriers to entry, reducing out-of-home advertising, increasing digital advertising, and optimizing phone specifications to meet customer needs. A key recommendation includes increasing digital advertising to reach target audiences to increase sales in the United States. The implications for social change include the potential to increase smartphone sales in the United States, translating into a more extensive tax base that community leaders could use to implement projects that benefit the entire community, such as parks and recreation facilities. Further implications include the potential to create new jobs.

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Dedication

I dedicate my doctoral degree to my family and friends who have supported me throughout my education and career. Earning a doctorate degree has always been a personal goal of mine and I am elated to have accomplished this feat. I have spent several years of my life earning advanced degrees and I am proud to have reached the terminal doctoral degree. In the past few years, I have traveled the world and lived in three different countries. I have made many friends from many different cultures. To my family and friends in the United Sates and across the world, thank you for your support over these years.

Acknowledgments

I acknowledge my chair, Dr. Jorge Gaytan, who has been very reliable and prompt. He has been meticulous with proofing my writing and always replied punctually to my messages. He promptly returned my doctoral study each time, which allowed me to make the necessary revisions. I also acknowledge Dr. Deborah Nattress, my second committee member, and Dr. Ify Diala, my University Research Reviewer, who have all been the best team a student could ask for when taking on the challenging and demanding deliverance of doctoral work. I thank all of you for your professional guidance and feedback throughout this process. It has been challenging, but in the end, it was all worth it.

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Section 1: Foundation of the Study

Smartphones are now more popular than ever. Individuals are becoming addicted to using their smartphones for study purposes, games, and other entertainment (Jeong, Kim, Yum, & Hwang, 2015). Barr, Pennycook, Stolz, and Fugelsang (2015) suggested that smartphones are negatively affecting human cognition as people are letting their smartphones do their thinking for them. Apple, Samsung, and HTC are the well-known leading smartphone manufacturers (Chen & Ann, 2016). Chinese smartphone and consumer electronics companies, such as Huawei and ZTE, have a significant market share in China, but not in the United States (Fu, Sun, & Ghauri, 2017). These Chinese business leaders need strategies to be successful in the United States and other global markets.

Background of the Problem

In this study, I focused on the marketing strategies that Chinese smartphone companies can use to enter the U.S. market. Chinese smartphone brands, such as Huawei, ZTE, and CoolPad, are very popular in China but have been unsuccessful in penetrating the market in the United States for various reasons, including government regulations and the suspicion of spyware in the devices (U.S. Federal Bureau of Investigation, 2018). Researchers need to explore this problem because there have been several cases of international companies trying to enter the U.S. market and being unsuccessful. Haier, a Chinese company that specializes in home appliances, successfully entered the United States with a manufacturing plant in South Carolina (Wu, Hoon, & Zhang, 2011). There were key strategies that Haier implemented that led to its success, which I discuss later in

this paper. The strategies that companies' leaders implement when entering new territories are essential to the success of those business organizations. Understanding the strategies that Chinese smartphone marketing business leaders use to increase sales of their smartphones in the United States may enable other business leaders to become successful in entering the U.S. market.

Problem Statement

Chinese smartphone manufacturing business leaders are experiencing difficulties associated with entering into the U.S. market, partly because of U.S. government concerns that the technology could be used by the Chinese government to gather intelligence (U.S. Office of the Director of National Intelligence, 2019). For instance, ZTE, a Chinese company and one of the world's top smartphone manufacturers behind Apple and Samsung, agreed to pay a $1.2 billion fine in 2018 after a U.S. government investigation found that ZTE had illegally shipped telecommunications equipment to Iran and North Korea (U.S. Department of Commerce, 2018). The general business problem is that some Chinese smartphone manufacturing business leaders are losing money in opportunity costs due to the use of ineffective marketing strategies to enter the U.S. market. The specific business problem was that some Chinese smartphone manufacturing business leaders lack effective marketing strategies to increase sales of their smartphones in the United States.

Purpose Statement

The purpose of this qualitative multiple case study was to explore marketing strategies that Chinese smartphone marketing business leaders use to increase sales of

their smartphones in the United States. The target population consisted of three Chinese smartphone marketing business leaders with successful experience in the use of marketing strategies to increase sales of their smartphones in the United States. The implications for positive social change may include the potential to discover effective marketing strategies used to increase sales of their smartphones in the United States. Increased sales could translate into a larger tax base for the community and more available funds to use toward more services for the local communities.

Nature of the Study

Researchers use three types of research methods, which are qualitative, quantitative, and mixed method (Saunders, Lewis, & Thornhill, 2016). Researchers use the qualitative research method to explore the *what*, *why,* and *how* of a phenomenon in its natural setting (Yin, 2018). Qualitative research methodology also involves using multiple techniques to collect data, such as interviews, observations, and review of documentation (Yin, 2018). These qualitative research characteristics are consistent with the purpose of my study because I explored the what, why, and how of a phenomenon, legal marketing strategies used to increase smartphone sales, in its natural setting. I used multiple data collection techniques to explore strategies that some Chinese smartphone manufacturing business leaders use to increase sales of their smartphones in the United States legally. For these reasons, I selected the qualitative research method for this study. Researchers use the quantitative method when generating numerical measures to compare, rank, and select data to support their decisions (Saunders et al., 2016). Because I did not generate numerical measures, the quantitative method was not suitable for this

study. Although researchers use the mixed-method research methodology to bring meaning to complex social phenomena, the mixed-method research methodology has challenges for beginning researchers because of the lack of consensus on design, integration, rigor, and writing (Greenwood & Terry, 2012). For these reasons, I did not select the mixed-methods research methodology for this study.

I selected a multi-case study design for this study. Researchers use the case study design to collect data from real-life scenarios, increasing the likelihood of obtaining strong results and powerful conclusions (Yin, 2018). The ability to collect data from real-life scenarios and to develop a strong study made the multi-case study design ideal for this study. Other qualitative designs that I did not select include phenomenological, ethnographic, and narrative designs. Researchers use the phenomenological design when concentrating on people-in-society settings and obtaining participants' perceptions of their lived experiences (Marshall & Rossman, 2016), which was not the focus of my study. Researchers use the ethnographic design to conduct prolonged observation for data collection purposes engaging in study participants' lives (Yin, 2018). I did not select the ethnographic design because my goal is not to conduct prolonged observations of participants' lives. Researchers use the narrative design to obtain participants' experiences in an open, interpretative way, which is typically sequential and nonstructured (Saunders et al., 2016). I did not use the narrative research design for this study because I did not focus on participants' experiences in an open, interpretative way.

Research Question

What marketing strategies do Chinese smartphone manufacturing business leaders use to increase sales of their smartphones in the United States legally?

Interview Questions

1. What marketing strategies have proven successful to increase sales of smartphones in the United States legally?

2. How did your employees respond to those marketing strategies?

3. How are marketing strategies to legally increase sales of smartphones in the United States effectively communicated throughout the organizational ranks and among stakeholders?

4. What were your key marketing strategies to increase sales of smartphones in the United States legally?

5. What are some of the consequences of not having marketing strategies to increase sales of smartphones in the United States legally?

6. What were the key barriers to implementing your organization's strategies to increase sales of smartphones in the United States legally?

7. How did your organization successfully address the key barriers to increase sales of smartphones in the United States legally?

8. What else would you like to share that I have not asked you regarding marketing strategies used to increase sales of smartphones in the United States legally?

Conceptual Framework

For this study, I selected the diffusion of innovation (DOI) theory (Rogers, 1962) to explore the legal marketing strategies Chinese smartphone manufacturing business leaders use to increase sales of their smartphones in the United States. Rogers (1962) stated that an innovation has several characteristics, including relative advantage, compatibility, complexity, trialability, and observability. Customers' perceptions of these characteristics of innovations affect marketing communications channels used and customers' adoption rates of new products, resulting in revenue increases for business organizations. Rogers (1976) identified several types of consumers through standard deviations of customers' adoption rates represented as a bell-curve distribution. Rogers labeled *innovators* those individuals first to purchase, followed by *early adopters*, *early majority*, *late majority*, and *laggards*. Innovators and early adopters are those customers most willing to try the innovation, despite the lack of knowledge about it. Innovators assume a key role in growing the future market by providing tangible examples of relative advantage, compatibility, and observability to other categories of consumers. The DOI theory aligns well with the purpose of this study because customers' perceptions of the innovative legal marketing strategies that Chinese smartphone manufacturing business leaders use to increase sales of their smartphones in the United States may affect marketing channels and customers' adoption rate.

Operational Definitions

The following terms are operational definitions that are not in a basic academic dictionary. The readers of this study may not understand these terms without these definitions, all of which came from scholarly sources.

Gather intelligence: To build up a detailed knowledge of threats to the country. For example, China and the United States feel they are global national security threats to each other, so each country wants detailed information about national leaders, technology, and infrastructure (U.S. Intelligence Community, 2020).

Malware: Malware, short for "malicious software," includes viruses and spyware that can steal personal information, send spam, and commit fraud. Criminals use appealing websites, desirable downloads, and compelling stories to lure consumers to links that can download malware – especially on computers that don't use adequate security software (U.S. Department of Commerce, 2013).

Spyware: Spyware is one type of malware that can monitor or control your computer use. It may be used to send consumers pop-up ads, redirect their computers to unwanted websites, monitor their Internet surfing, or record their keystrokes, which, in turn, could lead to identity theft (Tilborg & Jajodia, 2011).

Liability of foreignness (LOF): Liability of foreignness is a disadvantage that foreign firms can experience in host countries because of their non-native status (Gorostidi-Martinez & Zhao, 2017).

Assumptions, Limitations, and Delimitations

In this section, I list the assumptions, limitations, and delimitations that could impact the objectiveness of this study. Each of these points is important to emphasize because of the ability to integrate bias into the data. I present a discussion of the assumptions, followed by an overview of the limitations and delimitations of this study.

Assumptions

Researchers make some assumptions in each stage of their research (Saunders et al., 2016). Epistemological assumptions are about human knowledge; ontological assumptions are about the realities I encountered in my research, axiological assumptions are the extent and ways my values can influence my research process (Saunders et al., 2016). I assumed that the participants in my interviews provided accurate data. I assumed that the use of the concept of marketing strategies that Chinese smartphone companies use to increase sales of smartphones is universal across industries, cultures, and organizations. I was able to answer the overarching research question for this study from the data I collected from participants. I assumed that the business leaders of these Chinese smartphone companies were willing to participate in my study and supply me with the data and documents I need to conduct this study.

Limitations

Limitations indicate potential weaknesses in the study (Strauss & Corbin, 2015). All research methods have limitations and researchers should structure interviews in a way to avoid bias or threaten the credibility of the data (Saunders et al., 2016). By explicitly stating these limitations, I allow other researchers to replicate or expand a

study. A limitation of this study is that I only interviewed three Chinese smartphone company leaders. Conducting a study at a few organizations prevents the application of findings across the global smartphone industry. Other Chinese smartphone companies could have different strategies that they are implementing. Additionally, some leaders of Chinese smartphone manufacturing firms could choose not to participate in the study. Furthermore, the time limit for interviews is another limitation of the study.

Delimitations

Delimitations are factors that limit the scope of research (Marshall & Rossman, 2016). In this study, I conducted in-depth interviews with three Chinese smartphone marketing business leaders. I interviewed only selected participants that met the following eligibility criteria: The leaders of Chinese smartphone manufacturing firms must have successful experience in increasing the sales of their smartphones in the United States. The scope of this study was limited to only Chinese smartphone companies trying to increase sales of their smartphones in the United States.

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Significance of the Study

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Value to Business

A business can struggle to enter foreign markets for reasons such as LOF, which Gorostidi-Martinez and Zhao (2017) explained as a disadvantage that foreign firms can experience in host countries because of their nonnative status. Two of the biggest obstacles when doing business abroad are discriminatory costs, such as hostility, prejudice, and host government restrictions, and incidental costs, such as lack of local information, relationships, and cultural differences (Gorostidi-Martinez & Zhou, 2017).

Gorostidi-Martinez and Zhou provided strategies to avoid the LOF problem, including

engaging in business, social, and political activities with key network actors in the new

country. Similar strategies can also help a business to perform credible and committed

corporate social responsibility activities, such as community outreach programs. Chinese

companies, such as Huawei, would like to enter the United States because of access to the

technology and the world's largest market. Huawei does not have big a presence in the

U.S. market, and the company faces opposition for LOF reasons, such as resentment from

political lobbyists, anti-Chinese sentiments, and fear that the Chinese would stifle U.S.

businesses (Kan, 2013). However, Huawei can learn from the success of Haier, a Chinese

company that creates home appliances that successfully entered the United States and

grew revenue each year. There were several key strategies that Haier used to become

successful as the first Chinese company to have a manufacturing plant in the United

States when they set up in South Carolina. Haier had an American business partner

managing its U.S. branch, in which 95% of their employees were U.S. citizens fully

engaged in community activities and committed to customizing products specifically for

the U.S. market (Wu et al., 2011). These strategies and lessons learned can be of great

value for Chinese businesses like Huawei to be successful in the U.S. market.

Contribution to Business Practice

This study's contribution to business practice may include strategies that business

leaders could use to enter other markets successfully and legally. Ethical marketing is

important because business leaders should not lie or mislead their audience (Wang &

Keh, 2017). Business leaders often use cross-selling, offering additional products and

services to existing customers, as a way to increase income derived from customers or to build business relationships (Wang & Keh, 2017). However, Shah and Kumar (2012) discovered that one in five cross-buying customers is not making profit, leading to a great loss for the business due to the costs of goods and marketing exceeding the revenue realized by that customer. Imitating many other electronics companies, Huawei and ZTE cross-sell by offering additional products and services, such as network carriers, SD cards, and protective cases.

Implications for Social Change

The implications for positive social change of this study may include placing in the hands of potential customers cheaper smartphones with options that could make the lives of the public easier and more entertaining. Smartphones control every aspect of daily life. People make payments, manage businesses, obtain audio and video entertainment, control home smart systems, control security systems, and more all through their phones (Younes & Al-Zoubi, 2015). Not everyone can afford the newest smartphones; therefore, marketing cheaper options that are as effective could make customer's daily lives easier and more satisfying. The implications for positive social change may also include the potential to discover effective marketing strategies used to increase sales of their smartphones in the United States. Increased sales could translate into a larger tax base for the community and more available funds to use toward more services for the local communities.

A Review of the Professional and Academic Literature

I reviewed the literature on global expansion marketing strategies to increase sales of smartphones published in various journals and seminal scholarly books. Google Scholar, linked to the Walden University Library's website, served as the primary source for accessing journal articles. The Walden University Library allows students access to various databases. Databases used to obtain literature for this study included Business Source Complete, ABI/INFORM Complete, Emerald Management, Sage Premier, Academic Search Complete, and ProQuest Central.

Furthermore, I also accessed various open journals to obtain literature related to global expansion marketing strategies. AOSIS OpenJournals provides open access to peer-reviewed scholarly journals from various academic disciplines. Similarly, ScienceDirect provides both tolled and open access to a full-text scientific database containing journal articles and book chapters. In some instances, I accessed government websites to obtain information about global expansion marketing strategies.

The strategy for searching through existing literature entailed the use of keywords and phrases in the various databases listed above. I applied filters to database searches to narrow down the search results. These filters included specific keywords, a specified period, and specific databases. When using Google Scholar, I gave preference to articles published in or after 2016, ensuring the literature is topical and relevant. Secondly, I gave preference to articles that were available in the Walden University Library. The keywords and phrases I used in my search were *global marketing, Chinese smartphones, technology entrepreneurship, social entrepreneurship,* and *smartphone marketing*. Crossref and

Ulrich's Periodicals Directory are tools to verify that literature is peer-reviewed. There are 142 references in this study; 88 of the references are scholarly peer-reviewed articles representing 62% of the total. In addition, there are 14 books representing 10% and 9 government websites representing 6% of the total. Of the total number of references in this study, 96 (68%) were published within the 2016-2020 period. The literature review included 62 references. The publication date for 42 (67%) of these references is within the 2016-2020 period. In addition, 45 (73%) of the sources cited in the literature review are peer-reviewed journal articles and exclude websites and nonscholarly articles.

Literature Review Organization

The literature review section has several subsections. It begins with an introduction, which includes information about the strategy for searching the literature, the frequencies, and percentages of peer-reviewed articles as well as publication dates. In the next section, I focus on the application of the literature to the research question and include a brief description of the purpose of the study. The themes I discuss in this literature review are innovation management, customer behavior and values, and social entrepreneurship. Throughout the literature review, I compare and contrast different points of view and relationships between previous research and findings with this study.

The first theme, innovation management, includes a critical analysis and synthesis of the conceptual framework I selected for my study, which is the DOI theory, using supporting and contrasting theories from relevant literature on the topic of global expansion marketing strategies. Some of the supporting and contrasting theories are the disruptive theory of innovation, innovation theory of profit, and the crossing the chasm

model. The second theme, customer behavior, and values, starts with a brief overview of the development of global expansion marketing strategy construct over time. I discuss common concerns relating to the construct as well as the various definitions, antecedents, and consequences of global expansion. The third and final theme for discussion is social entrepreneurship. Corporate social entrepreneurship within a business explains the social involvement the business has in a community and the way that these activities can benefit a business (Zhang & Zhang, 2016). I start with a general discussion about social entrepreneurship as it relates to global expansion marketing strategies and then expand on examples of social entrepreneurship and the effects of social entrepreneurship on a business.

Application to the Applied Business Problem

The purpose of this qualitative, single case study was to explore marketing strategies that Chinese smartphone marketing business leaders use to increase sales of their smartphones in the United States. Developing an understanding of such strategies required a qualitative approach, more specifically an exploratory single case study. The findings from this study might provide insight into global expansion marketing strategies from a group of leaders' perspectives.

Diffusion of Innovation Theory

In this section, I present a critical analysis of the DOI theory and the supporting and contrasting theories, which are the disruptive theory of innovation, innovation theory of profit, and the crossing the chasm model. Each of these theories pertains to innovation

management, which I categorize as my primary theme under technology

entrepreneurship.

First, I will define technology entrepreneurship here in the 21st century when

technology is going digital, and most start-up companies use some form of technology as

their product or service. Giones and Brem (2017) identified and described technology

entrepreneurship in times of digitalization. Giones and Brem differentiated between three

areas: technology entrepreneurship, digital technology entrepreneurship, and digital

entrepreneurship. The technical definition of digitization is converting analog information

into the computer-readable bits. However, several individuals use the term to refer to the

way products and services are becoming more computerized. The reason Giones and

Brem defined these terms is to understand the motivation, behaviors, and financing

preferences of the different type of entrepreneurs. Giones and Brem explored the

technologies, key process activities, access to funding resources, and growth possibilities

for each of these types of entrepreneurship.

Giones and Brem (2017) researched the studies of other experts in the field of

technology entrepreneurship to develop a juxtaposition in these three areas. Giones and

Brem suggested that technology entrepreneurship involves new products based on

scientific breakthroughs, has a proof of concept and niche market, and funding comes

from public research grants and other sources. Giones and Brem also explained that

digital technology entrepreneurship is focused on smart devices (i.e., smartphones), uses

existing technologies (cell phones already invented), and seeks crowdfunding and venture

capital. Giones and Brem mentioned that digital entrepreneurship includes services and

products running on the internet and in the cloud, has a need to stay ahead of competitors, and also uses venture capital and crowdfunding. According to Giones and Brem, digital technology entrepreneurs, the focus of this article, combine existing technology with the growing use of the internet. They take a current invention and make it *smarter*. Smart devices are a perfect example. More household electronics like TVs, dishwashers, and alarm systems are connecting to the internet. Giones and Brem explained that these entrepreneurs are expected to sell their businesses to a more substantial player and want to solve a social problem such as making personal products and services more accessible from anywhere in the world.

The following theories of DOI, disruptive innovation, innovation of profit, and the crossing the chasm model, are all related to technology entrepreneurship and my first theme, which is innovation management. Rogers (1962) developed the DOI theory and explained that when an organization is diffusing information, organizational leaders are communicating information through various channels within the business over time. DOI is much like the sharing of internal knowledge and the spreading of new ideas and, according to Rogers (2002), there are four main elements: the diffusion of new ideas to include innovation, communication channels, time, and the social system. Rogers (2002) explained that there are several characteristics of the innovation-decision process: knowledge of the innovation, forming an attitude, adoption or rejection, implementation, and confirmation. In a small business, diffusion is essential to communication, engagement, competitive advantage, and performance.

Rogers (1962) stated that innovation has several characteristics, including relative advantage, compatibility, complexity, trialability, and observability. Customers' perceptions of these characteristics of innovations affect marketing communications channels used and customers' adoption rates of new products, resulting in revenue increases for business organizations. Rogers (1976) identified several types of consumers through standard deviations of customers' adoption rates represented as a bell-curve distribution. Rogers (1962) labeled as *innovators* those individuals first to purchase, followed by early adopters, early majority, late majority, and laggards. Innovators and early adopters are those customers most willing to try the innovation, despite the lack of knowledge about it. Innovators assume a key role in growing the future market by providing tangible examples of relative advantage, compatibility, and observability to other categories of consumers. The DOI theory aligns well with the purpose of this study because customers' perceptions of the innovative marketing strategies that Chinese smartphone manufacturing business leaders use to increase sales of their smartphones in the United States legally may affect marketing channels and customers' adoption rate.

Gunduc (2018) analyzed the manner individuals apply the DOI model in business competitions. Rogers's (1976) DOI theory aims to determine the conditions and dynamics of the spread of new ideas or products among the members of society. Gunduc looked at the Android and Apple (iOS) operating systems and conducted a quantitative study on the factors that affect smartphone sales. Gunduc used a mathematical model to determine that the mass media are rarely the only factor that influences a customer's buying decision. Gunduc also determined that the existence of a competitor has a

significant effect on sales. Gunduc clarified the way the DOI model can be applied to analyze smartphone sales. Gunduc explained that in 2008, while some manufacturers of mobile phones did not cope with the new smartphone trend and lost their share, other manufacturers joined the new smartphone trend and shared the market with their competitors. Gunduc explained that the existence of competitors helped all parties. Gunduc limited his study to only Apple's iOS and Google's Android smartphone operating systems.

Levy (2015) used the DOI theory to highlight the differences between the public sector and voluntary organizations using the telehealth service. Levy conducted a test across four healthcare specialists' locations and determined there was a bit of trepidation towards telehealth. The main problems were the frustrations and low tolerance that the staff had towards the failure of technology and the lack of technical support. Levy concluded that senior managers in the United Kingdom need to have the goodwill of staff with the desire to exploit innovation in clinical practice. Levy explained the way that some attributes that fit with the DOI theory helped to illustrate the findings from the data. Most clinical staff members do not embrace innovation, so the culture would need to change before telehealth services can expand.

Pashaeypoor, Ashktorab, Rassouli, and Alavi-Majd (2017) explained that evidence-based practice (EBP) education is essential for promoting clinical care and explored the experience of nursing students of EBP education using the DOI theory. Pashaeypoor et al. interviewed 14 participants and held two focus group discussions in Iran. The DOI model includes an innovation-decision process (teaching strategy) which

has five steps: knowledge, persuasion, decision, implementation, and confirmation. After the interviews, Pashaeypoor et al. analyzed the data that supported the conceptual constructs of the DOI model and classified the data into 11 categories based on the five steps of the model. Pashaeypoor et al. concluded that the DOI model is an excellent step-by-step method to promote EPB education. Pashaeypoor et al. defined the categories that fall under the five areas of the DOI model could be used to assess the experience of nursing students.

The U.S. Department of Education (2016) discussed that the implementation of innovative learning environments (ILEs) could cause many challenges. The U.S. Department of Education argued that innovative learning environments are unique opportunities to accelerate the generation and diffusion of innovation, particularly through high levels of observability and trialability of ideas, effective communication channels, and supportive social systems, which are all criteria of Rogers' (1962) DOI theory. The U.S. Department of Education determined that managers of collaborative learning environments require serial innovation, rapid DOI, and the conditions to support both of these processes.

The U.S. Department of Education (2016) explained that adaptive change is important to the success of ILEs. The U.S. Department of Education compared Rogers' (1962) DOI model with education by noting that an organization should first implement initial prototyping or development by an individual or team. Secondly, organizational leaders will adopt the innovation more widely until the innovation becomes part of the established norms. However, some of the challenges that schools will face include trying

to discard previously cherished practices, behaviors, and shift mindsets and invent new ways of working. Before implementing ILEs, an organization will have to address these challenges by fostering serial, distributed, participatory innovation, and conditions that support the diffusion of these innovations.

Mohammad, Poursaberi, and Salashoor (2015) discussed a form to advance the adoption of evidence-based practice (EBP) with Rogers' (1962) DOI theory. Mohammad et al. defined EBP as the application of the best research findings on clinical decision making. Mohammad et al. collected data from 482 participating nurses and nursing students. These participants responded to a questionnaire that included demographic information, a standard scale for the perception EBP attributes, an EBP scale, and an individual innovation inventory. Mohammad et al. concluded that individual innovation, attitude, knowledge, and the perception of EBP attributes influence EBP adoption. Among these factors, attitude had the greatest effect on EBP adoption. Mohammad et al. explained that the DOI model includes conditions that can advance innovation adoption. The findings can serve as a guide for the identification of factors that effectively influence EBP adoption.

Rizan, Phee, Boardman, and Khera (2017) attempted to establish concordance of general surgeon's prescribing practice with local intravenous (IV) oral antibiotic guidelines and to evaluate the effect of introducing educational antibiotic measures. Rizan et al. used the Rogers' (1962) DOI theory to explore the adoption of antibiotic stewardship practices. The DOI model is a change management framework that applies to human collectives adopting an innovative idea. Rogers suggested that there are five

categories of adopters: innovators (2.5% of the collective), early adopters (13.5%), early majority (34%), late majority (34%), and finally the laggards (15%). Rizan et al. conducted an awareness intervention program based on local guidelines for introducing a prompt sheet for giving an IV oral antibiotic. Rizan et al. collected data from 100 pre-awareness and 100 post-awareness intervention program participants. Rizan et al. concluded that educational measures are effective in improving prescribing behavior and intent among a group of early adopters, as Rogers contended, but not any other adopter. Rizan et al. explained that using prompt sheets when administering oral IV antibiotics can improve the percentage of hospitals that follow the local guidelines because hospital leaders will have to complete each step of the process properly.

Sabus and Spake (2016) explored a qualitative verification method that supports Rogers'(1962) DOI theory in physical therapy. The consolidated framework for implementations research (CFIR) proposes a framework of innovation implementation based on the DOI model that can be specific to rehabilitation professions in health care services. Sabus and Spake used two clinics and a total of 18 physical therapists to collect data through observation, spontaneous and unstructured questioning, workflow analysis, structured focus group sessions, and artifact analysis, including clinical documents. Four investigators analyzed and coded all of the data. Sabus and Spake concluded that in outpatient practices, patient-centered care and collaborative learning were foundational elements to diffusion of an innovation. Sabus and Spake also concluded that innovation in outpatient physical therapy practice is a social process that follows predictable patterns that strongly align with DOI theory and the CFIR.

Dibra (2015) claimed that Rogers' (1962) DOI theory applies to sustainability in the business of tourism. Dibra explained that tourism could contribute positively to the socio-economic development of a country but, since tourism is rapidly expanding, tourism can be dangerous if not managed properly. Dibra concluded that researchers prefer the DOI theory over other models developing sustainable tourism practices (STP) because DOI theory involves the spread of innovation, explains the decision for a company to adapt STP, measures the social psychological adaptation of STP, considers change as part of evolution, and is a widely accepted and applied theory of innovation. Dibra concluded that factors that influence the adoption of innovative STP with Rogers' DOI theory fall into three characteristics, which are innovation, organization (or adapters), and external environment.

Talebian and Mishra (2018) used the DOI theory to predict the different way that consumers would adopt the idea of connected autonomous vehicles (CAVs). Consumers are already using CAVs, such as Google's self-driving cars, in the United States (Marr, 2018). Talebian and Mishra surveyed 327 employees of the University of Memphis. Talebian and Mishra aimed to (a) understand the way that individuals rely on their social network when assessing the purchase of CAVs, (b) investigate the reasons individuals think about various barriers and incentives associated with adoption of CAVs, and (c) develop a seed for population synthesis. Tilebian and Mishra forecasted that, by the year 2050, the CAVs market share would be close to 100% only if all adopters are satisfied with their purchases; therefore, the probability that an individual becomes a satisfied adopter plays an important role in the trend of the adoption. Talebian and Mishra used the

DOI model to predict the acceptance of the next fleet of vehicles based on the DOI's adoption principles of the innovation, communication channels, time, and social system.

Mrabet (2016) discussed a multitude of ways for researchers to use the Internet and social media platforms to diffuse or spread information about renewable energy products. Mrabet defined diffusion as the process by which an innovation is communicated through certain channels over time among the members of a social system, based on the DOI theory. Mrabet restated that the four main elements of the DOI theory are innovation, communication channels, time, and social system. Individuals will adopt new technologies at different rates based on relative advantage, compatibility, complexability, trialability, and observability. Mrabet described that Web 2.0 is a collaborative web development platform that refers to the cumulative changes in the ways software developers and end-users achieve benefits from the web with advancements in user-centered web applications and handheld devices. Mrabet defined renewable energies as electricity produced from other than a conventional power source. These energies could include photovoltaic cells, thermal electric technologies, or wind machines. Mrabet explained that social networking plays a vital role in the promotion of renewable energies and discussed the factors that affect the rate of adoption by consumers.

Scott and McGuire (2017) analyzed methods that instructors use to apply universal design (UD) to college instruction. Scott and McGuire also analyzed the way the concept of UD evolved and spread on an international scale. Scott and McGuire defined UD as the design of products and environments people, specifically disabled people, use, to the greatest extent possible without having to retrofit accommodations to

assure access. Scott and McGuire used the DOI theory to identify patterns of change in this trend. The U.S. Department of Education, and universities like McGill University, managed projects to bring the concept of UD to college campuses to improve teaching. The DOI theory can help researchers to understand the adoption of UD-based instruction, suggesting some predictable pattern and support for diffusion.

Tanye (2016) addressed the security issues in eLearning and the effects these issues have on the diffusion of eLearning practice. The concept of eLearning involves the use of the web and digital media to deliver knowledge and skills. Tayne used a quantitative approach and surveyed students at three universities about the security features of eLearning. The dependent variable for the quantitative approach was the diffusion of eLearning practice in the universities. The independent variables were the perceived characteristics of the eLearning system by students and the factors that characterize students' adoption of eLearning systems in universities. Tayne concluded that perceived security had the highest effect on eLearning diffusion among the students in the three universities. The security factor had a 33% influence on eLearning diffusion. Tayne showed that students are very concerned about their data on eLearning systems and that the innovation and social systems' attributes of the DOI theory are the most important to the students.

Other Contrasting and Supporting Theories

There are several contrasting and supporting theories that are similar to Rogers' DOI model that are all relevant to my doctoral study. I will briefly describe the following three theories: (a) disruption theory of innovation, (b) innovation theory of profit, and (c)

crossing the chasm model. The authors of each of these theories described the process from taking an innovation to commercialization and the obstacles that may arise.

  Disruptive innovation theory. In 1995, Harvard University professor, Clayton M. Christensen, developed the term disruptive innovation. Christensen (1997) showed in a series of case studies that incumbent firms in the industry seem paralyzed when a lower-cost, lower-performing innovation enters the market and begins to disrupt the established industry structure. Christensen, Raynor, and McDonald (2015) defined a disruption as a process in which a small company, which likely has very few resources, can successfully challenge larger and more established incumbent companies. Those companies that are successful disrupters will target the needs of the market that are overlooked by larger companies and deliver a more suitable product at a lower price (Christensen et al., 2015).

  Christensen (1997) explained that disruptive innovation provides new market access to a product or service that initially was only available to a select group of consumers with a particular income or specified skill set. Christensen explained that several business characteristics exist of disruptive innovation, including lower gross margins, smaller target markets, and simpler products and services that are less appealing. Christensen et al. (2015) identified cases including businesses that did not adapt to the disruption and lost market share or failed. For instance, Netflix disrupted Blockbuster with home delivery DVD service and online streaming. Blockbuster did not adapt to this innovation and eventually went out of business (Gans, 2016). Christensen et al. did not identify Uber as a fully disruptive company because they did not target low-

end unserved customers; instead, Uber targeted customers already interested in ride-sharing. Taxi cabs are still trying to compete with Uber, as Uber's prices are only slightly lower than taxi's fares. Disruptive innovation is important to small businesses and entrepreneurs because a large disruption can cause the financial failure of a company.

Some scholars have criticized the disruptive innovation theory of Christensen (1997). Weeks (2015) analyzed the following three common criticisms that were identified by Lepore (2014) and provided solutions for each: (a) a lack of an adequately constrained definition of the term disruptive innovation, (b) a failure to identify and maintain a consistent unit of analysis in the research, and (c) a failure to account adequately for managerial agency. Lepore also accused Christensen of hand-picking his case studies and Weeks added that Christensen's publication venues lacked a peer-review process.

Weeks (2015) explained that Christensen did not give a solid definition of disruptive innovation. Christensen defined disruptive technologies as innovations that "result in worse product performance in the near term" (Christensen, 1997, p. 15). In addition, Christensen stated that these innovations are "typically cheaper, simpler, smaller, and, frequently, more convenient to use" (p. 15). Weeks explained that Christensen did a poor job with predicting firm-level outcomes as a unit of analysis. Weeks criticized Christensen for saying that managers are rationally behaving when they respond to disruptive innovations by retreating to higher margin markets and avoiding the disruptive technology. The implication is that if managers were able to understand the long-term effect of disruptive innovations, managers would behave differently.

Weeks (2015) recommended solutions for each of these criticisms. The first step would be to tighten the definition of the concept of disruptive innovation, limiting it to innovations of lower cost, lower performance, and appealing to a subset of the existing market or a new market. Upon tightening the definition of the concept of disruptive innovation, scholars would be able to more easily examine biases in research on a topic, such as the common survivor bias, which means that incumbents prosper through the disruption, and pro-innovation bias, which has its focus on the disrupter, always succeeds and the incumbent firms fail. The next step that Weeks suggested is defining the unit of analysis, which could be the technology, industry, firm, or firm leaders. Finally, analyzing the managerial responses to disruptive innovations and the type of managers able to recognize the long-term consequences of the disruptive innovations is very critical.

Innovation theory of profit. Schumpeter (1912) coined the innovation theory of profit. Schumpeter explained that entrepreneurs could earn economic profits by introducing innovation into the business to increase profit and enhance performance. In Schumpeter's theory, the first concept is to reduce the overall cost of production through innovation, such as technology. The second concept is to increase demand through the introduction of new products or services, expansion, attainment of new resources, or enhancement of the design. Schumpeter explained that innovation is a key element of economic change, as it relates to the business cycles, and has an indissoluble relationship with entrepreneurship.

Schumpeter (1939) explained that an entrepreneur could gain profit from a successful innovation by reducing the overall cost of production or increasing the demand for the product. Because competitors will usually copy an innovation, the profits that an entrepreneur obtains are only for a short period until the innovation ceases to be new or novice. Entrepreneurs can first enjoy a monopoly position in the market as their innovation brings substantial profits. But after some time, with competitors mimicking the innovation, the profits will start disappearing. Patents, trademarks, copyrights, and other legal protection of the innovation will help the entrepreneur to earn larger profits for a longer duration. As time elapses and with all factors remaining the same, the prices will rise as a result of increases in production costs. On the other hand, when firms adopt innovations, the supply of goods and services increases and their prices fall.

Fritsch (2017) discussed Schumpeter's (1912) theory and pointed out that, if inventions and entrepreneurial opportunities are abundant and available, the bottleneck for economic development is their commercialization. According to Fritsch, this transformation of ideas or inventions into innovations constitutes a special economic function, referred to as entrepreneurship, which is of key importance for triggering economic growth. Bloch and Metcalfe (2017) also mentioned that Schumpeter's theory is based on the price mechanism being central to the way that innovations are resolved into economic development, but that theory does not discuss which individual sets prices or the reasons that prices are changed. Bloch and Metcalfe focused on price determination in markets disrupted by innovations. Bloch and Metcalfe demonstrated that analyzing the

impact of the introduction and diffusion of innovations on rules and routines provides the foundation for a broadly applicable evolutionary price theory.

Crossing the chasm. Moore (1991) developed the crossing the chasm model in, which focuses on the specifics of marketing high tech products during the early startup period. Moore discussed Rogers' (1962) DOI theory and claimed that there is a chasm between the two groups that Rogers described as early adopters and the early majority. Moore defined these two groups as technology enthusiasts or visionaries and pragmatists and argued that it is very difficult to transition between these two groups. Moore described crossing the chasm similar to the five groups of people in Rogers' technology adoption lifecycle. Moore analyzed the expectations of the visionaries and pragmatists when choosing a target market, positioning, pricing, marketing, and distributing the product. Moore suggested that, if enough people support a product and join the bandwagon, the product becomes standard in society. The limitations of Moore's theory are that it only applies to disruptive innovations that change the behavior of customers. Rogers' technology adoption lifecycle can better define products that do not force a change of behavior in customers.

Li and Deng (2017) explored the market expansion path of knowledge-based international new ventures (KINVs) toward multinational corporations (MNCs) over time. Li and Deng analyzed global expansion paths of four KINVs headquartered in three countries, the United States, Japan, and Israel. Li and Deng analyzed data from sales and interviews with corporate executives and concluded KINVs that cross the chasm in lead markets are more likely to become MNCs. Li and Deng also identified several important

factors that enable KINVs to become MNCs. These enabling factors include firm-specific assets and capabilities, such as proven products, research and development expertise, intellectual property assets, brands, and reputation; a partnership with leading customers, and collaborators built during the dynamic process of crossing the chasm.

Literature Review Themes

As I previously mentioned, I will discuss the following three themes in this literature review: (a) innovation management, (b) customer behavior and values, and (c) social entrepreneurship. I juxtapose the different perceptions and relationships of each of these themes in relation to my study. I compare and contrast different points of view and relationships between previous research and findings with my study.

Innovation management. The first theme related to this study is innovation management. Brown and Anthony (2011) explained that innovation needs to be purpose-driven from the top of the pyramid down to the bottom, with the thought that innovation improves lives. In this ever-changing globalized market and the increasing challenge to remain competitive, businesses are prioritizing innovation management as a strategy to add value to customers without compromising consumer needs. According to Brown and Anthony, big-name companies, such as Proctor and Gamble (P&G), recognized that the key to achieving growth is not in remaining consistent, but instead through innovation, which allowed P&G to create new markets. Brown and Anthony suggested that businesses need to develop organizational structures that support innovation and drive new growth. Brown and Anthony defined three fundamental parts, known as the

development funnel in innovation management theory, that innovation management strategists must consider: ideas, prioritization, and implementation.

Drucker (2002) defined seven sources of innovation: unexpected occurrences, incongruities, process needs, industry and market changes, demographic changes, changes in perception, and new knowledge. In the smartphone industry, new knowledge and process needs are two of Drucker's sources that pertain to innovation. People are using these pocket-sized computers for their daily needs. Innovation in the smartphone industry comes from making devices more compact, useful, durable, with the lowest price possible. The role of innovation comes from addressing the items that Almquist (2016) defined as the 30 things that customers value. At the bottom of Almquist's elements of value pyramid lies functional values, such as connectivity, saving time, and organization, which are things that smartphones can do for their consumers. Innovation involves creating technology to satisfy the functional needs of the consumer.

Ringel, Taylor, and Zablit (2016) provided four attributes to a robust innovation strategy: (a) emphasize speed, (b) embrace technological platforms, (c) manage a managed lean research and development process, and (d) explore adjacent markets for profitable grown systematically. Ringel et al. also explained the importance of speed in innovation, the rate that companies develop new products and services, and the rate that organizations deliver the goods to the market. Companies that build processes and the organization culture around speed tend to apply lean processes, implement prototypes for consumer testing rather than waiting until the final product is perfected, dedicate employees and resources to the project, and set the proper measurement for the job.

Christensen (1997) explained that disruptive innovations would continue to evolve into the future. Nagy, Schuessler, and Dubinsky (2016) defined a disruptive innovation as something that can radically change or disrupt an existing market. If technology has a good enough functionality and offers something new to the market-place at low cost, it can be deemed disruptive (Nagy et al., 2016). The effect that innovations has on an organization is relative, as some individuals could see the innovations as disruptive while others see it as sustainable. Nagy et al. suggested that researchers seeking to predict disruptive innovations focuses on modeling diffusion patterns or adoption of an evolutionary approach to technology. Business leaders will look to see the way that the innovations align with their business model. Nagy et al. recommended a three-step process to identify disruptive innovations: identify the innovation and characteristics, identify the plate in the value chain that the innovation is used, and compare the disruptive innovation to other technologies already used in the organization.

Rock and Davis (2016) discussed ways business managers could devise brilliant ideas to solve complex issues that their companies are facing. There are four specific steps that individuals can take to foster these moments of insight. The first step is to notice quiet signals and find some alone time to garner a piece of mind. The second step is to look inward and have an internal focus on oneself. The third step is to feel happy and remain positive. Rock and Davis mentioned that people tend to notice more information when they are happy rather than concerned. The fourth step is to use less effort and occasionally step away from deliberation to aid in your decision-making.

Eggers and Kaul (2016) suggested that firms are more likely to come up with a technological innovation when they are lagging competitors in their respective market. However, these firms are more likely to be successful when they are technology leaders. This logic may sound counter-intuitive, but Eggers and Kaul suggested that firms should revisit the way that they allocate resources, be cautious about taking significant risks when innovating, and build a culture that promotes experimentation and failure. Eggers and Kaul made the point that organizations tend to perform better when they have strong capabilities such as better scientists and engineers, effective product development processes, and strong brand names. These advantages are not only likely to persist over time, but they are also likely to be helpful even when pursuing more radical inventions.

Di Fiore, Vetter, and Capur (2017) discussed the fact that leaders need to be proactive in this innovation-starved environment to promote external collaboration between employees and other stakeholders. Di Fiore et al. discussed that in the business-to-business (B2B) space, collaboration can lead to deeper knowledge, lower marketing costs, decreased risks, and increased trust. Di Fiore et al. gave the example of Italcementi, an Italy-based cement company, which collaborated with famous architects to create transparent and biodynamic cement products. This collaboration led to business growth, as Italcementi was able to position itself as innovators with minimal risk. Di Fiore et al. warned of four risks, or traps, that can come from collaboration: (a) treating the collaboration as an event instead of a gradual process that takes time, (b) designing the problem statement alone without input from others involved, (c) diverging timelines that do not fit everyone's goals, and (d) failing to generate empathy.

Jones, Cope, and Kintz (2016) explored the future of innovation management and the manner in which firms can ensure their practices are ready to meet future challenges. Jones et al. interviewed 36 innovation managers from different size companies in different industries about their views on key changes in technology, business management, and megatrends. Jones et al. discovered five broad themes as influences on the future of innovation management: partnerships, processes, position, people, and profession. Jones et al. then surveyed 155 participants on these five themes and determined that most respondents wanted a disciplined and defined innovation process, a diverse workforce, and sustainability.

Customer behavior and values. The second theme related to this study is customer behavior and values. Chen and Fan (2017) studied the importance of brand image, reputation, and loyalty in consumer purchasing, specifically the clothing brand UNIQLO. Chen and Fan surveyed 200 people of different age, but mostly ages 15-40, with various education levels, occupations, and income levels. Chen and Fan showed from their results that most buyers of UNIQLO clothing purchased UNIQLO because their friends did and these buyers liked the vibrant colors and styles, quality, retails stores, and the feeling of the clothes. Researchers can apply the same customer logic to other products, such as smartphones, because customers will often base their purchase decisions off aesthetics and peer pressure (Chen & Fan, 2017).

Customers in the consumer electronics market have their idiosyncrasies and preferences that will influence the items they will purchase and the timeframe in which they will purchase those items. Attri, Maheshwari, and Sharma (2017) surveyed 300

respondents, 62% male and 38% female, from different age groups and income levels

about the things that these respondents looked for when buying a smartphone. Attri et al.

concluded that hardware specifications and marketing communications are the most

significant influences on customers purchasing smartphones. Other features, such as

battery life, applications, and sound quality were next on the list of importance, and price

surprisingly was last. A critical take away from this study is that brand loyalty was also a

factor in customer purchasing decisions. Chen and Fan (2017) mentioned that Samsung

and Apple smartphone products were the most popular due to their brand image.

Bone et al. (2017) conducted two qualitative studies to determine the

effectiveness of open-ended positive feedback on customer purchasing behavior. Bone et

al. determined that when a customer is initially greeted positively upon entering a retail

store, the customer is more likely to make a purchase and give positive feedback about

the shopping experience. The key issues of the article were that customers consider the

cleanliness of an establishment, the affability of the customer service representative, and

the aesthetic appeal of a store when considering to make a purchase.

Chong, Ch'ng, Liu, and Li (2017) studied the effects of online marketing and

customer reviews on the customer demand for products. Chong et al. focused on big data

technology, which looks at thousands of web pages to gather an abundance of customer

information and then uses neural networks to form an analysis of customer behavior.

Chong et al. looked at variables, such as free delivery, customer review rating, number of

positive reviews, and those that up-voted the reviews that they found helpful. Chong et al.

concluded that all of these variables are equally important in determining customer demand.

Park and Huang (2016) researched motivators and inhibitors that affect behavioral intentions to book hotels using smartphones. Park and Huang addressed a behavior in customers using their smartphones for hotel booking. Park and Huang discovered that while most people booking their hotel with their smartphones do so because they perceive more control over their reservation, those booking hotels through the telephone do so because of anxiety. Park and Huang determined from their analysis of data collected that customers using a smartphone for hotel booking are also more self-efficient.

Kim, Wong, Chang, and Park (2016) addressed market saturation in the Korean smartphone market. This saturation is forcing the manufacturing companies to reallocate their resources to retain existing customers and attract new customers. Kim et al. collected data from 700 smartphone users to examine the effect of customer satisfaction and switching barriers on customer loyalty. The key takeaways from this research study are that Kim et. al showed that customer satisfaction and switching barriers, such as the attractiveness of other smartphones, cost, and learning curve, had the most significant impact on customer loyalty. The specifications and functions of the smartphone, customer service, and image of the smartphone company had the next greatest significant influence on customer satisfaction.

Asnawati (2018) conducted a quantitative research study on the effect of various types of shopping on impulse-buying using the Instagram smartphone app and website.

The variables that Asnawati researched were valued, idea, adventure, relaxation, and social shopping in Indonesia. In Indonesia, hedonic shopping, or shopping for pleasure, is more popular than shopping out of pure need. Asnawati gathered data about attitudes, opinions, and perceptions from over 100 participants making at least two purchases on Instagram. Asnawati conducted in-depth statistical analysis using SPSS software and concluded that idea shopping was the dominant factor that led to impulse-buying on Instagram. Asnawati also suggested that Instagram online shopping provides an experience that includes fun, entertainment, and aesthetically pleasing graphics that positively influence the buying decisions of customers.

Lancioni et al. (2017) studied the effects of a new smartphone-based program on leisure and communication activities for people with mental disabilities. The participants can place objects with frequency code labels on one smartphone and the signal would be picked up by a second smartphone. This connection can open up files and games on the second smartphone. The participants had multiple disabilities including blindness, inferior motor skills, and intellectual disability. The results of the study are that the participants went from zero minutes doing an activity without the smartphones, to 90 minutes doing an activity with the smartphones. Lancioni et al. proved the importance of smartphones in the daily lives of everyone, even the physically disabled.

Social entrepreneurship. Katzenstein and Chrispin (2011) defined social entrepreneurship as combining a social mission with a business-like discipline. Katzenstein and Chrispin discussed the challenges that they faced when trying to implement large-scale social change in Africa as social entrepreneurs. These social

entrepreneurs had the desire to make the world a better place in the most cost-effective and efficient way possible. Social entrepreneurs need to identify the social issue of intervention, develop a structure and aggregate the needed resources, build the technology needed, and learn to navigate the cultural and political landscape. The biggest challenges were gathering resources to address the health care issues in Africa, communicating with the indigenous people, and working through the political and cultural differences.

Wongphuka, Chai-Aroon, Phainoi, and Boon-Long (2017) defined social entrepreneurship as a well-integrated social movement composed of business and non-profit sectors. Wongphuka et al. aimed to explain the attributes and motivation of entrepreneurs and assess the competence in activism with youth and children. Wongphuka et al. gathered data from 32 social activists selected from 35 organizations and gave the participants questionnaires to assess their motivation and competence. Wongphuka et al. concluded that the motivation of these entrepreneurs came from four sources: (a) beliefs in human dignity and rights, (b) experiences with a role model, (c) experiences from own lives, and (d) feelings of gratitude to the nation. Wongphuka et al. also concluded that most participants had a high level of emotional understanding when interacting, adapting, and coordinating with others, which is necessary for social entrepreneurs.

Rey-Marti, Ribeiro-Soriano, and Sanchez-Garcia (2016) discussed social entrepreneurship could create job growth. Rey-Marti et al. examined the effect of the following five factors on job creation: (a) job training, (b) level of education, (c)

experience, (d) family history of entrepreneurship, and (e) financial support. Rey-Marti et al. defined social entrepreneurship as adding value in three areas: (a) economic benefit to society, (b) ecological benefit to the environment, and (c) social benefit to people and their quality of life. Rey-Marti et al. used a process called fuzzy-set qualitative comparable analysis (FSQCA) for relationships between non-linear variables. Rey-Marti et al. gathered data from surveying over 200 companies, performed FSQCA, and determined that experience, financial support, and education are the most important factors that help entrepreneurs to create jobs.

Santhosh and Baral (2015) developed a conceptual framework to explain the influence that organizations have on the attitudes and behaviors of their employees and other stakeholders. These stakeholders have corporate social responsibilities (CSR), which include providing sound policies and practices, allowing employees to participate in decision making, providing equity in employee remuneration, providing good working conditions, eliminating child labor, and avoiding gender biases. For employees, CSR involves practicing ethical advertising, adhering to product standards, prioritizing customer health and safety, and providing products at right prices. For the community, CSR involves providing outreach programs, such as improving and building schools, hospitals, and temples (Santhosh & Baral, 2015).

Frederiksen, Wennberg, and Balachandran (2016) discussed the insatiable taste for variety that many entrepreneurs possess, which may lead them to move between markets. Frederiksen et al. asked two questions: (a) To what extent does prior industry and geographic mobility influence an individual's propensity to found a new firm? and

(b) How does job mobility affect entrepreneurial performance? Frederiksen et al. defined

entrepreneurial performance using earnings from the respective organization and

measured job mobility and job switching as leaving from one paid job to the next.

Frederiksen et al. collected data from over 230,000 Swedish residents in the labor market

from government databases. Frederiksen et al. concluded that the more mobile

entrepreneurs are, the more likely they will enter an industry. However, this mobility

does not imply that they are sharing knowledge that they learned nor does it indicate

potential success.

Gielnik, Spitzmuller, Schmitt, Klemann, and Frese (2015) analyzed the theories of

self-regulation and self-perception. Gielnik et al. addressed within these two theories that

free choice and progress are two factors that affect entrepreneurial passion. Gielnik et al.

undertook two studies to test their hypotheses. Gielnik et al. measured entrepreneurial

effort using a five-point Likert scale that allowed participants to provide a quantifiable

answer for the type of effort invested into their ventures. Gielnik et al. measured

entrepreneurial passion using a similar method and asked the participants to rate the

enjoyment level when performing certain daily work tasks. First, Gielnik et al. conducted

a weekly field study with 54 entrepreneurs reporting entrepreneurial effort and passion

over eight weeks and 341 observations. Gielnik et al. showed that entrepreneurial effort

was positively related to an increase in entrepreneurial passion. In the second study,

Gielnik et al. experimented with 136 individuals to investigate the effect of effort on

passion and the underlying psychological processes in a laboratory setting. Gielnik et al.

concluded that entrepreneurs are more passionate about their ventures when they are making significant progress and invest out of their own free choice.

Hsu, Wiklund, and Cotton (2017) defined serial entrepreneurship as an individual's intention to reenter entrepreneurship, following a business exit and repeat this cycle many times. Hsu et al. also discussed prospect theory, which increases the attraction of taking a big risk following a loss in hopes of winning back your losses, similar to compulsive gambling in a casino. Hsu et al. addressed the self-efficacy theory, which scholars define as entrepreneurs encouraged by previous successes to continue with future ventures. Hsu et al. used a Likert scale to ask participants questions such as: "Given my success, would I do [insert entrepreneurial actions]?" When entrepreneurs have a positive attitude and are motivated, they are more likely to succeed and contribute positively to social change. Hsu et al. concluded that researchers use prospect theory to explain the reasons entrepreneurs will reenter the field when they have suffered a loss undermining their self-efficacy.

Lucas and Fuller (2018) discussed the moment when entrepreneurs create social value. Lucas and Fuller determined that society is better off when entrepreneurs work with stable institutions instead of poor institutions. In addition, Lucas and Fuller argued that entrepreneurs engaging in productive activities, such as startup and research and development, do not create social value. Lucas and Fuller explained that entrepreneurs making business decisions that leave customers incurring the additional costs just so the business can prosper do not create social value.

Zhang and Zhang (2016) evaluated the various ways that engaging in social undertakings within a community can lead to a precise definition of CSR. Zhang and Zhang explored the impact that environmental factors inside and outside of an organization can have on promoting the goal of securing the well-being of the community in which a business operates. Zhang and Zhang also developed a model encompassing the dimensions of motive, opportunity realization, and resource cooptation. Zhang and Zhang provided PepsiCo as an example of successful CSR. PepsiCo transformed the deserts in Mongolia into high-yield potato-growing land and also invested more than 200 million yuan, the Chinese currency, into agricultural developments in China. This investment benefitted the environment, community, and local farmers. Zhang and Zhang argued that social entrepreneurs value altruism and public interest. Zhang and Zhang concluded that successful social entrepreneurship involves collaboration between the entrepreneurs and the stakeholders to overcome any financial obstacles.

Transition

The purpose of this qualitative multiple case study was to explore marketing strategies that Chinese smartphone marketing business leaders use to increase sales of their smartphones in the United States. With increased political resistance from the U.S. government and other countries, Chinese smartphone manufacturers need to devise different ways to market their products globally. The DOI theory (Rogers, 1962) is useful for Chinese smartphone company managers to understand the rate at which consumers will adopt their innovative products. The disruptive innovation theory (Christensen, 1997) can help these business managers to discern if their products will disrupt the

operations of governments, businesses, and the personal lives of these consumers. Both the innovation theory of profit (Schumpeter, 1912) and crossing the chasm model (Moore, 1991) can help business managers focus on the desires of consumers for advanced technology, which will lead to more product sales and increased profits. Chinese smartphone managers should also implement CSR by getting more involved in community outreach so that the citizens of other countries will embrace their company and products.

Section 1 included the background, the problem, and the purpose of this study. Section 1 ended with a review of the literature and a summary of the gaps in the literature. Section 2 includes an overview of this research study. I provide a discussion of participants, the role of the researcher, population and sampling, and ethical measures. In Section 2, I also include details about the research method and design, data collection analysis processes, and the reliability and validity of this study. In Section 3, I included the presentation of findings, application to professional practice, implications for social change, recommendations for action and future research, reflections, and conclusion.

Section 2: The Project

The project topic was to explore the marketing strategies that leaders of Chinese smartphone companies can use to increase global sales on their products in the United States. The most significant assumption from the U.S. government is that Chinese smartphones contain malware or spyware to gather information on U.S. citizens. However, there is no published official evidence that Chinese smartphones are spying on us. If the U.S. government has proof of Chinese smartphones containing spyware, they have not shared it publicly. However, there is a solid, proven history of espionage from the People's Republic of China within the United States. In 2018, the U.S. Department of Justice had several criminal convictions of U.S. and Chinese citizens caught spying for China in numerous ways, including providing classified material, selling U.S. military technologies, conducting economic espionage, and acting as an agent for the People's Republic of China (U.S. Department of Justice, 2018). Given the history and current political climate of the United States and China, the United States has assumed that Chinese electronics are designed to spy on Americans. In addition to regulatory hurdles and cultural differences, Chinese smartphone companies have to deal with the Committee of Foreign Investment to the United States, a branch of the U.S. government that handles international businesses (Wu et al., 2011).

This study involved investigating global marketing techniques that some of the top Chinese smartphone manufacturers use. In this section, I explain the project, including the (a) purpose statement, (b) role of the researcher, (c) participants of the research, (d) research methods and design, (e) population and sampling, (f) ethical

considerations, (g) data collection instruments and techniques, (h) data organization

techniques, (i) data and analysis, and (h) reliability and validity.

Purpose Statement

The purpose of this qualitative, multiple case study was to explore marketing

strategies that Chinese smartphone marketing business leaders use to increase sales of

their smartphones in the United States. The target population consisted of three Chinese

smartphone marketing business leaders with successful experience in the use of

marketing strategies to increase sales of their smartphones in the United States. The

implications for positive social change may include the potential to discover effective

marketing strategies used to increase sales of their smartphones in the United States.

Increased sales could translate into a larger tax base for the community and more

available funds to use toward more services for the local communities.

Role of the Researcher

In a qualitative research study, the role of the researcher involves several steps.

The researcher needs to get permission to assemble a group of participants in the study,

establish an interactive dialog, organize and execute the research, collect data, analyze

the data collected, and report the findings (Yin, 2018). I collected data from Chinese

smartphone manufacturers regarding successful strategies they used to increase sales of

their smartphones in the United States legally. A case study design involves defining the

concept, collecting data from multiple sources, completing interviews, transcribing

interviews, analyzing data, and developing codes and themes (Saunders et al., 2016). In

addition to conducting semistructured interviews, I used other sources of data as

suggested by Yin (2018), including company documentation, archival records, and physical artifacts. By working with leaders in the Chinese smartphone industry, I created a list of potential candidates to participate in this study. I kept an audio recording of all interviews, wrote down each audio response verbatim, and examined each participant's responses to interview questions for emergent themes.

My prior experience as an electrical and systems security engineer for over 10 years allows me to understand the technologies and capabilities of smartphones. I worked as a U.S. government employee for 6 years, including serving 2 years in China. My years of engineering experience gave me an objective view of the vitality and necessity of smartphones for business and personal use. I also worked with many customers before my government service, which helped me to frame interview questions in a way to provide participants with the opportunity to give objective answers. My experience in China also gave me a subjective view of the espionage agenda that China possesses and continues to demonstrate, according to the U.S. Department of Justice (2018).

When conducting this social research, I needed to consider the ethics involved. The American Psychological Association (2010) established ethical, legal, and policy standards that govern scholarly publishing. My research should take into account these ethical considerations, as well as those required by the Walden University's Institutional Review Board (IRB), when conducting social research. As a qualitative researcher, I have a duty to conduct research in an ethical manner (American Psychological Association, 2010), following the guidelines provided by *The Belmont Report* protocol (U.S. Department of Health & Human Services, 1979). *The Belmont Report* includes three

basic principles that researchers must adhere to when conducting research with humans, which are respect for persons, beneficence, and justice (U.S. Department of Health & Human Services, 1979). Under these three principles, researchers should recognize the autonomy of participants, ensure they commit no harm to participants, and treat all participants fairly and equally (U.S. Department of Health & Human Services, 1979). I made sure to adhere to the three principles contained in *The Belmont Report* when conducting this study.

The Belmont Report protocol contains pertinent information on the use of ethical principles related to obtaining informed consent from participants, assessing risks and benefits, and selecting participants. The report includes an essential section about the disclosure and understanding of information and the voluntary nature of participation (U.S. Department of Health & Human Services, 1979). As the researcher, I must conform to (a) the ethical principles of *The Belmont Report*, (b) IRB requirements, and (c) participating organizations' internal requirements. I needed to obtain permission from the IRB before I begin my research study. All participants signed an informed consent form stating their consent to the study, after I explained to them the informed consent principle, that participation is voluntary, and that withdrawal from participating in this study can occur at any time during this research study.

Researchers often tend to have biases towards their personal views, which can make their studies more biased (Saunders et al., 2016). When researchers show favoritism towards evidence that supports their own beliefs, researches have *confirmation bias* (Saunders et al., 2016). I had the critical task of mitigating my own bias, also

referred to as a personal lens (Walden University, 2016), during the data collection process. To avoid personal bias, researchers use member checking (Saunders et al., 2016), which allows participants to look over their own experiences for accuracy. I conducted member checking by giving participants my interpretations of their responses to interview questions and asking participants to verify that my interpretations of their answers are accurate. By carefully documenting all assumptions and limitations of this study, I enhanced the validity and reliability to this study.

To conduct a proper interview, I should follow an appropriate interview protocol that includes interview procedures, an introduction and conclusion script, and reminders to secure informed consent from participants and ask open-ended questions with appropriate prompts, as recommended by Yin (2018). In addition, Yin suggested that researchers should ask good questions, be a good listener, stay adaptive, have a firm grasp on the issues, avoid biases, and collect the research data ethically. The interview protocol (see Appendix B) guided me during the interview process and ensured that I shared the same information with all participants.

<div align="center">**Participants**</div>

Yin (2018) emphasized the importance of researchers identifying a diverse pool of suitable participants before beginning with data collection, which improves the validity of a study. Marshall and Rossman (2016) suggested that the participants' eligibility criteria must align with the research study's overarching research question. Researchers encounter several challenges when conducting a research study, including finding businesses that are suitable to the study, which grants researchers access to their

employees and company records (Yin, 2018). Additionally, researchers must obtain

written consent from all study participants for legal and ethical reasons (Marshall &

Rossman, 2016). For participation in a research study, researchers must create criteria for

eligibility (Saunders et al., 2016). Some examples of these criteria are age, length of

employment, and position in the company (Saunders et al., 2016). For participants to be

suitable for a research study, they should possess successful experience and knowledge

directly related to the phenomenon researchers are investigating (Yin, 2018).

I developed criteria to determine whether participants were eligible to participate

in my study based on their experience with marketing strategies used to increase sales of

their smartphones in the United States. Eligible participants for this study were business

leaders of Chinese smartphone manufacturers with at least 5 years of successful

experience in using global marketing strategies to increase sales. Specifically, I chose to

interview participants working for three Chinese smartphone companies because these

companies have a significant presence in China but are struggling to gain market share in

the United States. The business leaders for these companies were appropriate for this

study because they all had a wide range of knowledge, experience, and background in the

use of successful marketing strategies to increase sales of their smartphones in the United

States.

Yin (2018) noted that it is a challenge for researchers to gain access to the

participants and their organizations. Saunders et al. (2016) recommended that researchers

gain an understanding of the target population, work with important members of the

organizations in which they plan to conduct their study, and use additional recruitment

methods to communicate with prospective participants. Saunders et al. mentioned that when a researcher chooses participants, the researcher shows the assumptions and the environment used for the study. By communicating with executives of Chinese smartphone manufacturing companies, I developed an appropriate strategy to gain access to participants for this study.

In a qualitative study, it is essential that the researcher establish trust and rapport with the participants to obtain rich and valuable data (Marshall & Rossman, 2016). Researchers interact with study participants to gain their trust and acceptance to collect rich and thick data (Fusch & Ness, 2015). I made sure that I interacted and engaged with the participants throughout the research process to ensure I collected rich and thick data.

Selecting the appropriate research design allows researchers to align the overarching research question with study participants (Saunders et al., 2016). Researchers are able to answer a study's overarching research question by establishing eligibility criteria for participants to ensure the selection of participants with successful experience and suitable knowledge directly related to the phenomenon the researchers are investigating (Yin, 2018). I have selected the case study design to align participants' criteria for participating with the study's overarching research question. I selected participants with successful experience and knowledge directly related to the phenomenon I am investigating in this study, which is the marketing strategies that Chinese smartphone marketing business leaders use to increase sales of their smartphones in the United States.

Research Method and Design

Research Method

Yin (2018) stated that three distinct methods of research are available to researchers: qualitative, quantitative, and mixed. For a qualitative study, researchers should explore the phenomenon using social constructionism and their subjective interpretations (Saunders et al., 2016). Qualitative studies require the researcher to work in a natural environment because the researcher explores the phenomenon under investigation in its natural setting (Saunders et al., 2016). A researcher using the qualitative research method explores the *what, why*, and *how* of a phenomenon in its natural setting (Yin, 2018). I chose a qualitative research method because I intended to explore the *what, why,* and *how* of a particular phenomenon, specifically, the use of marketing strategies to increase sales of smartphones in the United States.

Quantitative researchers use various measuring techniques to analyze variables and examine the relationships between them (Saunders et al., 2016). In quantitative studies, researchers use controls to ensure validity and set clear questions and hypotheses (Saunders et al., 2016). Because I did not examine relationships between variables, analyze variables using measuring techniques, or setting hypotheses, I did not select the quantitative method for my study. Another type of study is a mixed-method study that allows the researcher uses a combination of both qualitative and quantitative methods (Yin, 2018). In a mixed-method study, researchers use inductive and deductive reasoning (Yin, 2018). I did not choose the mixed method for this study because I did not need the quantitative part of the mixed method.

Research Design

I considered several research designs for my qualitative study, which included narrative, phenomenological, ethnographic, and case study. Researchers using the narrative approach record participants' experiences described as personal stories that allows the researcher to interpret their answers in different, nonstructured, and sequential ways (Saunders et al., 2016). Because I did not focus on the experience of participants told as personal stories, I did not use the narrative research design. When a researcher focuses on the participants' lived experiences and then tries to interpret and understand meanings and gain insights, a reseacher uses the phenomenological design (Petty, Thomson, & Stew, 2012). I did not focus on studying the personal meanings of participants' lived experiences; therefore, I chose not to use the phenomenological design for this study. Marshall and Rossman (2016) explained that the ethnographic research design has a focus on in-depth exploration of social and cultural values of a group or community. Because I am not trying to conduct an in-depth exploration of social and cultural values of a group or community, I did not use the ethnographic research design. Researchers use the case study design for analyzing problems in business and management practice in the real world. (Saunders et al., 2016). If researchers set out to conduct an in-depth investigation of a phenomenon within the participants' environmental context and validate their findings by triangulating data, researchers use the case study design (Yin, 2018). For this study, I used the case study design because I explored the what, how, and why of a phenomenon in its natural setting, which is the use of marketing strategies to increase sales of smartphones in the United States.

Researchers achieve data saturation when additional data collection and analyses do not generate any new information or themes (Malterud, Siersma, & Guassora, 2016). Researchers must achieve data saturation to produce findings that are conclusive (Yin, 2018). I reached the data saturation point by continuing to collect and analyze data until no new information or themes emerge.

Population and Sampling

Researchers need to select an appropriate sampling method, which will ensure the validity and authenticity of their studies (Saunders et al., 2016). I selected an appropriate sampling method to identify and carefully choose participants for my study meeting the same established criteria to obtain relevant information related to the phenomenon under investigation. Researchers refer to this process as criterion sampling (Palinkas et al., 2015). I narrowed down my participant pool by using criterion sampling, which also ensured that the participants meet the same eligibility criteria and are able to provide insight into the phenomenon under investigation. For this qualitative study, I collected data from three Chinese smartphone marketing business leaders with successful experience in the use of marketing strategies to increase sales of their smartphones in the United States. When determining an appropriate sample size, researchers consider if the sample generalizes to a larger population, the investigative nature of the study, and the richness and thickness of the data (Blaikie, 2018; Fusch & Ness, 2015). Vasileiou, Barnett, Thorpe, and Young (2018) suggested that quality is more important than quantity and that five to 50 participants can suffice for a qualitative research study. Malterud et al. (2016) agreed that participants should possess successful experience about the

phenomenon under investigation. Researchers could face challenges associated with the determination of the appropriate sample size for a case study (Yin, 2018). Researchers should have two or three replications for their case study (Yin, 2018).

Researchers reach data saturation when they are unable to obtain any new information from the participants (Malterud et al., 2016). I set a threshold of three participants for reaching data saturation. If I did not reach data saturation with three participants, I would have continued to conduct interviews until I reach data saturation. After researchers conduct a few semistructured interviews and the knowledgeable participants have provided in-depth information related to the phenomenon under investigation, researchers could reach data saturation (Marshall & Rossman, 2016). Asking open-ended questions during semistructured interviews allowed me to obtain rich and thick data and reach data saturation. I received participation approval from qualified candidates through social media messaging, emails, and phone calls.

Participants must be comfortable with the interview setting to engage in open dialogue (Yin, 2018). Therefore, I made sure the interview setting is appropriate and convenient to make the participants comfortable to engage in open dialogue. Saunders et al. (2016) explained that researchers could ease the anxiety of participants by providing a comfortable atmosphere in a convenient setting for building rapport and substantial conversation. Conducting interviews in private and quiet places allow participants to feel comfortable (McGrath, Palmgren, & Liljedahl, 2018). The interview setting that I selected for participants was conducive to open dialogue, convenient to help address participants' anxiety, and suitable for building rapport with participants improve

communication. The interview with each participant took approximately one hour, and I reminded each participant of this estimated period.

Ethical Research

Marshall and Rossman (2016) explained that researchers need to obtain consent from their participants before commencing a study. I ensured that each of the participants in my study signed the informed consent form before the process of data collection begins. When participants read the informed consent form, they understood the expectations, risks, benefits, and the purpose of the study (Yin, 2018). The consent form also contained my contact information should they have any questions. Roth and Von Unger (2018) recommended that researchers inform their participants that participation is voluntary. I reminded my participants that they can remove themselves from the study at any time without having to give a reason or suffer any negative repercussions. The consent form distinctly indicates that participants can voluntarily withdraw from the study at any time by indicating their desire to withdraw verbally or in writing without any negative results. Every study should emphasize the privacy and confidentiality of participants (Saunders et al., 2016). I discussed with each participant that participation is voluntary and that the option to withdraw from the study was available without any negative consequences. Reid, Brown, Smith, Cope, and Jamieson (2018) mentioned that providing gifts to participants could lead to biases in the study. Therefore, this study's participants did not receive any gifts, money, or other tangible benefits before, during, or after the research study.

The minimum age for participating in the study was 18; therefore, I made sure that all participants were over this age of consent. I did not commence the interview process until after I received permission from Walden University's IRB. Walden University has guidelines administered by the IRB that directs researchers to adhere to the safety and informed consent of participants. I followed these guidelines meticulously when conducting my study. The Walden University's IRB approval number for this study is 01-28-20-0740107.

Nusbaum, Douglas, Damus, Paasche-Orlow, and Estrella-Luna (2017) systemized two parts to the informed consent process, which are creating a consent form and presenting it to research participants. I used simple English to create the consent form, which will ensure that participates with different English proficiency levels can easily understand the interview questions, as Nusbaum et al. (2017) recommended. After I chose a qualified participant, I gave the participant a copy of the informed consent form and meticulously reviewed each item with each participant. Researchers should review the consent form with each participant in their study because not all participants will read the entire informed consent form (Ittenbach, Senft, Huang, Corsmo, & Sieber, 2015).

I used codes in place of the real names of participants and their affiliated businesses to ensure confidentiality. In addition, I did not include any identifiable attributes that would lead to anyone discovering the identity or organizational affiliation of the participants. At the end of a research study, a researcher should produce reliable, substantial, and ethical results that have a negligible impact on the participants (Yin, 2018). I collected and stored all documents related to my research study on my personal

password-protected, encrypted external hard drive. I will keep all physical documents

locked away in my home for 5 years. Finally, I will destroy all research-related data after

5 years to ensure adherence to IRB guidelines, as required by Walden University (2016).

Data Collection Instruments

Lincoln and Guba (1985) first discussed in the 1980s the concept of the researcher

as the primary research instrument. Researchers become the research instrument in

qualitative research (Hoppen, Rigoni, Klein, & Ritter, 2016). When conducting a case

study, researchers should understand their position as the research instrument and use

interviews, observations, document analysis, and other instruments to collect data

(Saunders et al., 2016).

Open-ended questions are the most common type of interview questions

researchers use in qualitative case studies (Weller et al., 2018). Researchers learn about

participants' perceptions of, and experiences with, the phenomenon that researchers are

studying by conducting interviews (Çakır & Cengiz, 2016). Researchers administer

semistructured interviews when researchers plan to ask questions following the interview

to adequately interpret participants' responses (Mahat-Shamir, Neimeyer, & Pitcho-

Prelorentzos, 2019). By administering semistructured interviews, researchers investigate

the phenomenon by collecting data from the experts within the business or company

(Saunders et al., 2016).

I purposively selected my participants from three Chinese smartphone

manufacturers. I used open-ended questions in semistructured interviews to gather data

from participants. Researchers collect rich data by gathering detail-oriented experiences

from participants about the phenomenon under exploration (Fusch & Ness, 2015; Twis, Miller, Cronley, & Fields, 2019). Researchers may discover new themes by conducting semistructured interviews to collect rich and thick data (Twis et al., 2019). The researcher can ask follow-up questions to clarify responses from participants after asking the predetermined interview questions (Twis et al., 2019). I conducted semistructured interviews to be able to ask follow-up questions to obtain clarification related to participants' responses to collect rich and thick data that may lead to the discovery of new themes.

I am the primary research instrument and, as such, I gathered data from participants by conducting, recording, and transcribing semistructured, video and telephone interviews. I used the interview protocol described in Appendix B to facilitate the interview process. As established in the interview protocol (see Appendix B), the participants provided answers to all of the interview questions. Then, participants had an opportunity to give any final thoughts or comments at the end of the interview process about ways that Chinese smartphone companies can expand their market in the United States. By inquiring about final parting thoughts, researchers give the participants a moment to discuss their personal experiences and opinions about the phenomenon being studied that they may not have emerged from the interview (Saunders et al., 2016). Researchers bring their own bias to their studies and must address this bias by engaging in reflexivity exercises, which involves researchers reflecting upon any decisions and actions made about the data collected (Dodgson, 2019). Reflexivity is essential in a case study because it focuses on the bias of the researcher and the transparency of the research

process (Dodgson, 2019). I engaged in reflexivity exercises to think and reflect about the decisions and actions made regarding the data collected.

Document analysis is an additional technique that researchers use when collecting data (Sutton & Austin, 2015; Yin, 2018). By interviewing and using document analysis together, researchers can expand exploration of the phenomenon that they are investigating (Sutton & Austin, 2015). Using at least two methods of data collection together improves the rigor of the study because the researcher is able to conduct methodological triangulation (Fusch, Fusch, & Ness, 2018). Various documents exist that researchers can analyze, such as annual reports, financial statements, and budget justifications (Sutton & Austin, 2015; Yin, 2018). These documents can give the researcher pertinent information about the case study, such as event names and details (Yin, 2018). I analyzed annual reports, balance sheets, income statements, market data, and other related documentation about Chinese smartphone manufacturer sales inside of China and in the United States. Member checking is the process researchers use to allow participants to verify the accuracy of participants' answers to interview questions, improving the validity of the research process (Birt, Scott, Cavers, Campbell, & Walter, 2016). I used member checking by giving participants my interpretation of their answers to interview questions and asking participants to verify the accuracy of such interpretation.

Data Collection Technique

Participants must have experiences related to the phenomenon that researchers are investigating; therefore, researchers use semistructured interviews to collect these

experiences (Adhabi & Anozie, 2017). Researchers ask open-ended questions about the

phenomenon under investigation, and the participants provide responses containing their

rich experiences (Adhabi & Anozie, 2017). Based on the central research question,

researchers guide the direction of the interviewsand use supporting questions to acquire

additional information to assist them in answering the study's overarching research

question (DeJonckheere & Vaughn, 2018). I conducted semistructured interviews with

business leaders from Chinese smartphone manufacturing companies in China to obtain

marketing strategies that they use to increase smartphone sales in the United States.

Researchers also analyze the supporting documents from the organization, in addition to

the semistructured interviews, which relate to the phenomenon they are investigating

(Sutton & Austin, 2015). By utilizing several data collection methods, researchers acquire

a deeper understanding of the phenomenon under investigation and increase the rigor of

their research studies because researchers conduct methodological triangulation, which

requires at least two data collection methods (Fusch et al., 2018). I analyzed the business

materials that relate to the marketing strategies of Chinese smartphone manufacturers

located in China to increase their sales in the United States.

Advantages and disadvantages to using semistructured interviews and assessing

company documents to collect data exist (Sutton & Austin, 2015). Some of the

advantages are that researchers can ask clarifying questions, which gives participants an

opportunity to expand on the answers (Adams, 2015). Another advantage is that

researchers can see the body language of participants when answering interview

questions (Adams, 2015). When analyzing company documents, researchers can

implement methodological triangulation by gathering information from a multitude of

sources to see if there is alignment in the data from each source (Fusch et al., 2018).

Researchers may uncover new themes for further exploration based on analyses of

organizational documentations (O'Keeffe, Buytaert, Mijic, Brozovic, & Sinha, 2016).

Lastly, the documents from the companies include details about the phenomenon under

investigation, such as the correct spelling of the names of employees participating in the

study (Sutton & Austin, 2015). I gathered data by administering semistructured

interviews with open-ended questions and ask questions for clarification purposes that

allowed participants to expand on their answers. I performed methodological

triangulation by gathering information from participants through semistructured

interviews and reviewing company materials related to the phenomenon under

investigation. I looked for data alignment when I compared all of the data that I collected.

On the contrary, several disadvantages to conducting semistructured interviews

and reviewing company documents exist (DeJonckheere & Vaughn, 2018). Participants

may become uneasy and apprehensive when researchers record participants' responses

during the interview (McIntosh & Morse, 2015). Beginner researchers could face

obstacles related to their inexperience with administering semistructured interviews

(McIntosh & Morse, 2015). Lastly, the participants could integrate bias into their

responses by giving answers that they think will please the researchers (McIntosh &

Morse, 2015). Researchers may also inadvertently integrate their biases into the research

study through body language or verbally (Oltmann, 2016). When it comes to the

disadvantages of analyzing company documents, the employees creating the

organizational documents may have infused their own biases into the documents,

following their interests or opinions (Oltmann, 2016). There is also the possibility that if

the authors of the organizational documents incorporated their own bias, then those

documents may have an inaccurate account of the events (Leung, 2015). A researcher

may initially have a difficult time just obtaining access to company documents (Leung,

2015).

When appropriate, researchers conduct a pilot study to verify the pertinence and

coverage of the study's content (Majid, Othman, Mohamad, Lim, & Yusof, 2017).

Conducting a pilot study is a time-consuming task and it is not necessary when using

qualitative data collection techniques, such as semistructured interviews and company

documents (Majid et al., 2017). Therefore, I did not administer a pilot study for this

qualitative case study because it is a time-consuming task and it was not necessary

because I used a variety of qualitative data collection techniques.

Member checking is a technique that researchers use to give participants the

opportunity to review and confirm the researchers' interpretation of participants' answers

to the open-endedinterview questions, allowing researchers to verify the accuracy of

participants' answers (Birt et al., 2016). Researchers will also use member checking to

improve the integrity and credibility of the data that they collected (Birt et al., 2016).

Some of the disadvantages of member checking are that researchers may assume that if

participants in their study do not have any comments about researchers' interpretation of

their answers, then the participants agree with the researcher. However, the participants

may not have read the researchers' interpretations of their answers to intertview questions

(Yin, 2018). Additionally, participants could feel apprehensive about disagreeing with the researchers' interpretations of their answers and may feel inclined and obligated to accept them as presented (Birt et al., 2016). I used member checking in my study by giving participants ample opportunity to review and correct my interpretations of their responses to ensure the accuracy of my interpretations of participants' answers to interview questions.

Data Organization Technique

Yin (2018) recommended that researchers conducting qualitative studies should develop a data organization system prior to analyzing data collected. This data organization system results in more rigorous research studies (Yin, 2018). Yin (2018) emphasized the importance of compiling orderly data in a way related to quantitative data in a database. Upon using the data organization system to order the data, researchers begin the data analysis process (Marshall & Rossman, 2016).

For this qualitative study, I conducted semistructured, video and telephone interviews using open-ended interview questions (see Appendix A) with Chinese smartphone marketing business leaders with successful experience in increasing sales of their smartphones in the United States. Researchers must ensure that they assign each study participant a unique code to maintain participants' confidentiality (Allen, 2015). I assigned a unique code to each Chinese business leader participant, consisting of the letter *P* and a number between 1 and 3, and each participating organization, consisting of the letter *O* and a number between 1 and 3. I deleted any information found on the transcripts that can lead to the discovery of participants' identities. Saunders et al. (2016)

recommended that researchers should change the names of participants to ascertain

anonymity. Saunders et al. (2016) also suggested that researchers change the names of

other people and places that participants may mention during the interviews. When I

reproduced in verbatim each business leader's transcript, I removed the identifying

information and assigned each participant a unique code. However, since I as the

researcher knew the true identity of the participants, the participants' identities were

classified as confidential.

One method I implemented to maintain confidentiality is to keep designated

password-protected folders that contain electronic transcripts, notes, and observations, on

a flash drive. All documents related to a participant included the unique code that I

assigned to each participant. I safeguarded data and increased data security by scanning

paper files to convert them into PDF files. Each organizational document that I reviewed

had a unique identification number. The conversion process of scanning paper documents

into electronic records was the first step towards arranging all organizational

documentation data. The next step was filing these electronic records into folders that

allowed for easier retrieval and overall organization of the data. I included annotated

bibliographies on all scanned documents, which facilitated indexing and retrieving of

electronic data, as Yin (2018) recommended.

In addition, I kept electronic data in the designated folder on a password-protected

flash drive. By moving raw data from the password-protected flash drive to a computer-

assisted qualitative data analysis software (CAQDAS) program, I improved the

organization of the data. Researchers use CAQDAS programs to more effectively

organize and analyze their data (Woods, Macklin, & Lewis, 2015). Woods et al. (2015) also noted that although CAQDAS enhances the data analysis process, CAQDAS is by no means a substitute for the researcher's role in organizing and analyzing data.

Researchers should keep a reflective journal to enhance the transparency of their research process (Vicary, Young, & Hicks, 2016). This journal can also help researchers in the process of bracketing or placing observations into categories (Vicary et al., 2016). Researchers can use their reflective journals to record rich descriptions about the research methodology selected and collect other details, such as participants' nonverbal cues exhibited during the interviews or interview setting specifics (Bashan & Holsblat, 2017). I maintained an electronic version of a reflective journal on my personal computer. In this journal, I noted rich descriptions of many research process details, such as participants' nonverbal cues when responding to interview questions and the overall interview setting atmosphere. I also noted reflections and other ideas when reviewing organizational documents, coding decisions, and identifying themes to decisions about theme declaration to enhance the transparency of my research process.

A critical aspect of securing information is not retaining the data longer than required (Ranney et al., 2015). There is legislation related to protecting data that researchers can use to guarantee they implement the best practices for safeguarding data during and after their research study (Sutton & Austin, 2015). The methods to secure data include (Sutton & Austin, 2015): (a) clarifying the reason for collecting data, (b) obtaining informed consent from participants, (c) gathering only information that the researcher needs for the study, (d) using the data specifically for the research study, (e)

retaining the data as long as necessary and later destroy them, and (f) securing the

information.

To restrict unauthorized access to my data, I stored all raw data that I am not

currently using on a password-protected flash drive and kept hard copies in a locked safe.

Researchers have ensured the security of their data by implementing these similar

security precautions in the past (Surmiak, 2018). DuBois, Strait, and Walsh (2018)

stressed the importance of researchers considering similar ethical obligations for

collecting data during their research, such as locking away hard copies and using a

password-protected computer for electronic copies. After the completion of this study and

according to the requirements of Walden University, I will keep the raw data locked

away in a safe for 5 years. After 5 years, I will destroy the external flash drive and shred

the hard copies.

Data Analysis

Researchers use triangulation to increase the richness and thickness of data

collected (Fusch et al., 2018; Heale & Forbes, 2016). Among the various types of

triangulation, methodological triangulation involves the collection of data using various

sources to increase the credibility and validity of the data collected (Heale & Forbes,

2016). Researchers conduct methodological triangulation to explore the phenomenon

under investigation from various perspectives (Marshall & Rossman, 2016). For example,

researchers develop convergent evidence when they triangulate data collected from

conducting semistructured interviews and reviewing organizational documentation.

Yin (2018) explained that in case studies, converging evidence increases construct validity. I conducted methodological triangulation by using several data collection methods, which are semistructured interviews and organizational documentation and artifacts. By using methodological triangulation, I also corroborated the validity, credibility, and authenticity of the data, interpretations, and analysis. I worked with the participants to use member checking on the interpreted data for accuracy and reliability. I informed the participants of my interpretations of their answers to interview questions and asked them to correct any inaccuracies of my translations. I ensured data alignment by comparing and contrasting the member-checked data with data I obtained from reviewing organizational documents and artifacts.

Qualitative data analysis is a process that needs continual refining and often coincides with data collection (Sutton & Austin, 2015). Thematic, content, and discourse analysis are three methods for qualitative data analysis (Neuendorf, 2019). For thematic analysis, the researcher will review the interview transcripts several times to get a solid understanding of the text (Neuendorf, 2019). Researchers use CAQDAS, such as DeDoose, to help them organize and analyze the data, and to identify themes and the relationships among the themes (Talanquer, 2014).

Yin (2018) gave five steps, in order, which researchers should use when analyzing data: (a) compile, (b) disassemble, (c) reassemble, (d) clarify, and (e) conclude. The first step, compile, involves gathering and organizing data to look for patterns and themes within the various interview transcripts. Zamawe (2015) suggested that researchers use NVivo, a qualitative data analysis software program, which can speed up the process of

organizing and analyzing data. During the second step, disassembling, researchers disassemble the data collected and later assign codes to them. During the third step, reassembling, researchers reassemble and reorganize the data by themes. The fourth step, clarify, relates to using thematic analysis to authenticate the interpreted data against the interview transcripts. Qualitative researchers use thematic analysis to identify patterns and themes in the data collected to be able to answer the study's overarching research question (Neuendorf, 2019).

I used NVivo 12 in the data analysis process to group my data by common themes. I coded and interpreted the data that I collected from the interviews and organizational documents and artifacts. I used NVivo 12 to identify relationships between themes in the data sets. When researchers implement member checking, they can use thematic analysis to corroborate the interpreted data with participants (Nowell, Norris, White, & Moules, 2017). I conducted member checking by giving study participants my interpretation of their answers to interview questions and asking them to verify the accuracy of my interpretations.

Researches use a multitude of data sources when conducting case study research (Saunders et al., 2016). Yin (2018) emphasized that researchers can enhance the richness and profoundness of the data by using triangulation. Using methodological triangulation allows researchers to authenticate and validate the data collected from several sources, such as semistructured interviews and organizational documents and artifacts (Fusch et al., 2018). Regarding the documents and artifacts related to the participating organization, researchers use several data analysis methods, including thematic and content analysis

(Neuendorf, 2019). I used content analysis to analyze the participating organizations' documents and artifacts. Researchers analyze the data collected using content analysis but researchers must first organize codes and emerging themes (Elo et al., 2014). The three phases of content analysis are preparation, organization, and reporting (Elo et al., 2014). I conducted methodological triangulation by triangulating data I collected from conducting semistructured interviews and reviewing organizational documents and artifacts.

The fifth and final step that Yin (2018) identified for researchers conducting case study research was developing conclusions and recommendations derived from the study findings that allowed me to answer this study's overarching research question. In this study and to explore the phenomenon under study more effectively, I organized and assembled all data collected, disassembled these data by codes, reassembled these data by themes, conducted thematic analysis to interpret data, and developed conclusions that emerged from study findings.

When researchers map the similarities among the themes in different sets of data, researchers are able to concentrate on the essential themes to be able to answer the study's overarching research question (Yin, 2018) and to correlate these essential themes with current literature and the conceptual framework (Lines et al., 2014). One method for researchers to use to categorize data into essential themes is by coding data with labels (Lines et al., 2014). In addition, frequency analysis is a method that researchers use to find the statistical frequency of thematic codes found in data categories (Wu, Thompson, Aroian, McQuaid, & Deatrick, 2016). I utilized NVivo 12's data-coding feature to map key themes into data categories, which improves the validity of this study. Within the

literature, researchers can find key themes in the conceptual framework (Wu et al., 2016). The conceptual framework helps researchers find a relationship to previous literature, the methodology, and the results of a study. I correlated the key themes that may emerge from my study with current literature and the conceptual framework selected for this study.

<div align="center">**Reliability and Validity**</div>

Lincoln and Guba (1985) established four criteria that researchers use to establish reliability and validity in research studies. These four criteria are dependability, credibility, transferability, and confirmability. When researchers address these four criteria in their qualitative studies, researchers establish validity and reliability, equivalent to the way quantitative researchers establish reliability and validity in their studies (Anney, 2014).

Reliability

Reliability is an essential part of qualitative case studies, and researchers attempt to find ways to establish reliability. Researchers must use reliable instruments and tools to generate convincing and reliable results (Leung, 2015). When conducting case study research, researchers must use several sources for data collection (Ridder, 2016). I used several sources for data collection, including semistructured interviews and organizational documentation and artifacts. Yin (2018) stated that researchers should know that one source for data collection is not necessarily better than other sources; instead, researchers should know that using as many sources for data collection as possible is an good plan because several data sources complement each other rather well.

Dependability in qualitative research is the stability of data over time and over conditions (Anney, 2014). To improve the dependability of this study, I used a panel of experts to review the overarching research question, interview questions, and research design for this study, as recommended by several scholars (Usry, Partington, & Partington, 2017). Schneider and Coates (2017) explained that researchers must use the same list of interview questions with each participant; consequently, I used the same list of interview questions during interviews with each participant. I also used member checking to increase and confirm the dependability of data collected, as suggested by several researchers (Saunders et al., 2016). Researchers use member checking by giving their interpretations of participants' answers to interview questions to study participants and asking them to verify the accuracy of such interpretations (Birt et al., 2016). Researchers use member checking to increase the dependability of the data collected, ensuring that researchers' biases are not integrated into the data collected (Birt et al., 2016).

To produce reliable interview transcripts and themes, researchers should audio-record interviews to later review them to reflect on participants' responses to interview questions (Sutton & Austin, 2015). I requested that this study's participants fully explain their answers to interview questions to decrease the probability of adding my own biases to the data collected. If the participants' responses did not provide sufficient substance or details, I asked participants to expand on their answers. Several authors (Raheim et al., 2016) suggested that researchers should not divulge information related to the research study before the interview to eliminate tainting study participants' experiences,

generating more reliable results Castillo-Montoya (2016) recommended that researchers follow the interview protocol meticulously and not ask any new questions that will lead to inconsistency and reduce the reliability of the study.

Validity

The research validation framework includes credibility, transferability, and confirmability (Anney, 2014). Case study researchers ensure credibility by using interactive data collection methods to compare data collected within a single case organization or across several organizations, if a multiple case study (Korstjens & Moser, 2017). In a situation in which there is only one researcher conducting the study and analyzing the data collected, the researcher establishes the credibility of data analysis if data collected is a sample of the entire population (Sutton & Austin, 2015). Researchers should read carefully read the interview transcripts to help researchers establish credibility (Neuendorf, 2019). I reviewed interview transcripts very carefully to ensure I captured all participants' experiences related to the phenomenon under investigation. In addition, I concentrated on the similarities and differences among study participants' responses to interview questions. After I transcribed the interviews and before I analyzed the data, I used member checking to ensure that my interpretations of participants' responses to interview questions are the actual representation of participants' experiences regarding the phenomenon under investigation, as Saunders et al. (2016) and Yin (2018) recommended. To conduct member checking, I gave study participants my interpretation of their answers to interview questions and asked participants to verify the accuracy of my interpretations.

Researchers define transferability as the application of the results of a research study to another study (Korstjens & Moser, 2018). I used semistructured interviews for pilot testing to aid in the applicability of my research to other populations (i.e., transferability), as Majid et al. (2017) suggested. My agenda for this study was to produce high-quality results by choosing suitable study participants, giving specific demographic information related to the study participants, analyzing data extensively, and presenting findings in easy-to-follow format, which will improve the transferability of my research study.

Researchers establish confirmability, after they establish dependability, credibility, and transferability (Yin, 2018). Researchers establish confirmability by demonstrating that the data collected from study participants and their organizations are actual representations of participants' experiences with the phenomenon under study, avoiding the integration of biases into the data collected (Korstjens & Moser, 2018; Nowell et al., 2017). I carefully listened to participants' answers to interview questions to write down my thoughts, insights, and biases. I also transcribed interviews very carefully, connecting data with results and using current literature, to increase the confirmability of study results.

Researchers conduct methodological triangulation to increase the validity of a case study (Fusch et al., 2018; Marshall & Rossman, 2016). When researchers use methodological triangulation, they use multiple sources of data collection to compare the data to see if data alignment exists to increase study validity (Fusch et al., 2018; Marshall & Rossman, 2016). I used methodological triangulation in this study by conducting

semistructured interviews and reviewing organizational documentation and artifacts to increase the validity of this study. Researchers achieve data saturation when additional data collection and analyses do not generate any new information (Malterud et al., 2016). Researchers must achieve data saturation to produce findings that are conclusive (Yin, 2018). I reached data saturation by continuing to collect and analyze data until no new information emerged.

Transition and Summary

The purpose of this qualitative multiple case study was to explore marketing strategies that Chinese smartphone marketing business leaders use to increase sales of their smartphones in the United States. I incorporated several recommended techniques that I mentioned in Section 2 into my qualitative case study. Yin (2018) suggested that researchers conduct an interactive semistructured interview with participants, use other sources of data such as company documentation, and organize and analyze the data. Nowell et al. (2017) suggested that researchers use member checking to verify the responses of participants. Marshall and Rossman (2016) advised that researchers conduct methodological triangulation to explore the phenomenon under investigation from various perspectives. Sutton and Austin (2015) stressed the importance and provided methods to secure the data after the researcher completes his or her case study. I used each of these strategies when I collect my data.

In Section 1, I included the background, problem, and purpose of the study. In Section 1, I also added the overarching research question, conceptual framework, application to social change, and wrote a review of the literature and a summary of the

gaps in the literature related to the study. In Section 2, I provided the role of the researcher, a discussion of participants, population and sampling, and ethical measures. Also, in Section 2, I included details about the research method and design, data collection and organization analysis processes, data analysis, and the reliability and validity of this study. In Section 3, I will incorporate the presentation of findings, application to professional practice, implications for social change, recommendations for action and future research, reflections, and conclusion.

Section 3: Application to Professional Practice and Implications for Change

In Section 3, I deliver a summary of the purpose of the study, convey the overarching research question, and present the findings. In addition, I include a discussion related to the way this research study applies to professional practice, state the implications for positive social change, provide recommendations for future actions and study, and give my personal reflections. Finally, I provide closing statements in the conclusion subsection of this study.

Introduction

The purpose of this qualitative, single case study was to explore marketing strategies that Chinese smartphone marketing business leaders use to increase sales of their smartphones in the United States. I conducted individual telephone and video conference call interviews with three business leaders of Chinese smartphone manufacturers with at least 5 years of successful experience in using global marketing strategies to increase sales in the United States. Other sources of data included were annual reports, internal reports, internal emails, Facebook posts, and publicly available market share analyses between 2016 and 2020. Analysis of data resulted in four themes, namely, (a) removing barriers to entry, (b) reducing out-of-home (OOH) advertising, (c) increasing digital marketing, and (d) optimizing phone specifications to meet customer needs. I discovered subthemes in one of these themes, which reinforce the applicability of the main themes to this study.

Presentation of the Findings

The overarching research question for this qualitative, explorative multiple case study was, What marketing strategies do Chinese smartphone manufacturing business leaders use to increase sales of their smartphones in the United States legally? I conducted semistructured interviews with three business leaders of Chinese smartphone organizations to answer this study's central research question. I analyzed all data collected and the following four themes emerged: removing barriers to entry, reducing OOH advertising, increasing digital advertising, and optimizing phone specifications to meet customer needs.

Theme 1: Removing Barriers to Entry

After I analyzed the data using NVivo 12, the first theme that emerged was that removing barriers is critical to enter the U.S. market. From the analysis of data collected from semistructured interviews, I identified three noticeable obstacles that Chinese smartphone companies encounter and must overcome when trying to enter the U.S. market: brand recognition, carrier and distribution networks, and marketing budgets. All three leader participants (P1, P2, and P3) shared that their respective organizations (O1, O2, and O3) face at least two of the three barriers to entry. Removing these barriers to entry has a substantial impact on the marketing strategies of the respective Chinese smartphone companies. By removing these barriers to entry, Chinese smartphone companies may have a chance to compete with, and possibly outperform, Apple in the United States, which has already happened in much of the rest of the world (Zhong, 2019).

Brand recognition. Brand recognition was a common barrier that the business leaders of Chinese smartphone companies needed to overcome to enter the U.S. market. The brand recognition barrier consisted of the competition between more well-renown brands and lesser-known brands. P2 and P3 articulated that they needed to promote their brand to get more established in the market. However, P1 already had a famous brand and, consequently, the promotion of that brand was not a priority. All three participants understood the importance of their smartphone brand being recognized and accepted by the public.

P2 expressed that brand recognition applies to any product, not just smartphones. Chen and Fan (2017) emphasized the importance of brand image as it relates to clothing but noted that brand image is essential in any product. P2 stressed that companies need to "get their products out there," referring to smartphones, and that brand visibility is directly related to marketing dollars. P2 explained that some companies would continuously promote their brand name in commercials and other advertising, but O2 has less money to spend on marketing. Therefore, O2 works from the grassroots level and targets a smaller niche market to build a product that suits that market. P2 and P3 repeatedly referenced that Apple and Samsung are the largest smartphone manufacturers in the United States. P2 explained that Apple and Samsung take the majority of sales from high-end customers. Still, the low-end customers unable to afford Apple or Samsung phones are the underrepresented market. P2 emphasized that O2 focuses their marketing efforts on customers desiring a phone that can do basically the same things that Apple and Samsung phones do, such as take good pictures and check emails, but at a

lower price. P3 emphasized that O3's products are not as well-known as Apple and Samsung and, therefore, they have to compete with these well-known brands and try to gain recognition. P3 stated that one of the problems that O3 is facing is "not having the brand recognition of Apple . . . some customers do not know about [company name]. So we have to compete with bigger brands names." Attri et al. (2017) surveyed 300 participants and discovered that brand loyalty was one of the factors that can influence customers' purchasing decisions.

Unfortunately, there is a negative side to brand recognition. P2 expressed concerns that Chinese smartphone companies are gaining a bad reputation in the United States. P2 noted that with the 2019 COVID-19 health pandemic that started in China, coupled with the U.S. government's stance on Chinese security threats, O2 has faced finger-pointing comments, racial profiling, and xenophobia. P1 understands the vitality of the technology giant, Google, in the United States and noted that O1 neither installs nor allows the installation of Google services on their smartphones. P1 stated that "not having the Google services . . . would be the main barrier for a Chinese smartphone [company]. Not having Google services is a big disadvantage because everyone is locked down to having Gmail, Google Maps, etc." The brand image of Google is overwhelmingly favorable and preferred in the United States (Guttmann, 2020) and, therefore, O1 has to deal with this barrier. P1 mentioned that, to remove the barrier of not having Google Services, O1 sometimes advises potential customers on ways to hack or *jailbreak* their phones to add Google services.

Carrier and distribution networks. P2 and P3 mentioned that carriers and distribution networks in the United States are a significant barrier. P2 stated that "the United States sells nine out of 10 smartphones through a carrier or a carrier distribution center. [These carriers are] just a handful of decision makers that allow those our phones to be in the U.S." Some examples of U.S. carriers are Verizon, AT&T, T-Mobile, and Sprint. T-Mobile and Sprint merged together in April of 2020 (U.S. Federal Communications Commission, 2020). The carrier distribution networks are the retailers that sell smartphones in the United States, such as Wal-Mart and Best Buy. P2 explained that due to the requirement that smartphone companies must sell phones through carriers, O2's main customers are these carriers. O2 sets up its offices in the United States around these carriers. For example, if Verizon has a major office in Seattle, Washington, O2 sets up an office nearby. P1 mentioned that most of O1's smartphone sales in the United States are presently through online retail. These online sales eliminate the need to sell through carriers and distribution centers.

P2 and P3 explained that O2 and O3, respectively, promote their smartphones by working with distribution centers. Both P2 and P3 discussed their respective in-store field programs, which are promotional activities that involve O2 and O3 visiting the distribution centers and conducting product training and promotional events. O2 and O3 often host events with the distribution centers and include special guests to promote their respective smartphones. P2 explained that O2's field program process starts with contacting a carrier distribution center, discussing the field event program, arranging a date and time for the event, and sending their field representatives to conduct training on

their new phones. The employees of these carrier stores get to learn about a new product and educate the customers as soon as these customers walk through the door. P2 elaborated on the fact that these face-to-face training programs are much more useful than just sending out promotional emails or other digital communication because people tend to ignore unsolicited messages.

Marketing budget. P2 and P3 understand the pertinence of their marketing and advertising budget for their respective organizations. P1 is a leader at O1, a much larger Chinese smartphone company than O2 and O3. O1 has more funds allotted to its marketing budget than O2 and O3 do. P2 reiterated that marketing dollars are a critical barrier to entry in the U.S. market. P2 emphasized that O2 does not do much traditional OOH advertising, such as street billboards and public transit flyers. Instead, O2 relies on digital marketing and field events. P2 emphasized that a company cannot just throw an abundance of money into any facet of marketing. P2 stressed that a company needs to understand the best channels in which to spend marketing dollars. Due to being a smaller, unknown company in the United States, O2 has a more modest marketing budget than O1. O2 focuses on the lower-end market of smartphones. These lower-end customers generally earn less income than the average customer, and they do not purchase the expensive Apple or Samsung smartphones.

O3 has had the most success in terms of sales with digital marketing and, therefore, O3 allocates most of its marketing dollars to digital marketing. Digital marketing consists of social media advertising, such as Facebook, Twitter, and other similar internet and mobile application services. P3 explained, "we spend about 70% of

the budget on digital marketing because that is where we have had the most success."

Eggers and Kaul (2016) suggested that when organizations are behind in their market,

they are more likely to develop innovative ideas. Eggers and Kaul also indicated that

companies should focus on procedures that they use to allocate resources. This strategy is

evident in O1, O2, and O3. Each organization is lagging U.S. competitors, such as Apple

and Samsung, in the U.S. smartphone market. O1, O2, and O3 are all presently

optimizing their marketing strategies to increase sales in the United States.

I reviewed O1's Annual Report (O1AR), O2's Annual Report (O2AR), O3's

Annual Report (O3AR), and several other company documents, which are available on

the organizations' websites. After reviewing the Annual Report from 2017-2019 for each

organization, I gained a better understanding of the significance all three participants

attached to each of the four themes that emerged from this study. The authors of the 2019

O1AR revealed that the U.S. Department of Justice filed several lawsuits and criminal

charges against O1. These lawsuits perpetuate the legal barriers to entry that O1 faces

when trying to enter the U.S. market. The authors of the 2019 O3AR confirmed that O3's

focus is on high-growth overseas markets and has concentrated its overseas business in

the United States. However, the volatility of new generation mobile phones and the

COVID-19 outbreak have added to O3's barriers to entry. The authors of the 2019 O3AR

also showed that O3 had a budget for that year of about USD$35 million for selling and

distributing expenses, an increase of about 70% from 2018. Hence, O3 enhanced its

marketing efforts on its new smartphone products, which increased its marketing

expenses. This increase in marking expenses led to an increase in O3's revenue in 2018.

The 2018 O3AR confirmed that O3 has a strong relationship with U.S. mobile carriers T-Mobile and MetroPCS. According to the 2018 O3AR, the senior business leaders of T-Mobile and MetroPCS recognize O3's technical strengths and anticipate more in-depth cooperation between the organizations in the future. The 2017 O3AR showed a net increase of 7.1% as a percentage of total revenue in selling and distributing expenses between 2016 and 2017. This increase occurred because of the decline of sales volume, increase in marketing expenditures, advertising, and promotion activities to improve the brand image in the overseas market during the year. This increase shows that O3's leaders were spending on promoting their brand, which confirms that brand recognition is a significant barrier to entry that O3 must overcome.

Correlation to the literature. The findings noted in Theme 1, align with the findings of Chen and Fan (2017) in that brand image is an essential element for any product. Chen and Fan explained that most buyers of UNIQLO clothing made purchases because of the popularity of the UNIQLO brand. Furthermore, Attri et al. (2017) concluded that hardware specifications and marketing communications are the most significant influences on customers purchasing smartphones, followed by brand image. The findings from Theme 1 also align with the study Bone et al. (2017) conducted about customer engagement at retail stores. Bone et al. examined the benefits that distribution outlets, such as retail stores, receive from customer engagement. Bone et al. concluded that when a customer is initially greeted positively upon entering a retail store, the customer is more likely to make purchases and give positive feedback about the shopping experience. Business leaders occasionally implement cross-selling to offer additional

products and services to existing customers (Wang & Keh, 2017). However, cross-selling does not always lead to a profit, as Shah and Kumar (2012) discovered.

Correlation to the conceptual framework. Theme 1 relates to Rogers' (1962) DOI theory, which was the conceptual framework used in this study. Rogers stated that innovation has multiple characteristics and that customers' perceptions of these characteristics affect marketing communication channels. In this study, the methods that Chinese smartphone companies used to remove the barriers to entering the U.S. smartphone market affected the rate in which customers adopted a new smartphone. Rogers (1976) used the standard deviations of customers' adoption rates and classified customers, in order of first to last based on their adoption rates, as innovators, early adopters, early majority, late majority, and laggards. Rogers explained that there are several characteristics of the innovation-decision process: knowledge of the innovation, forming an attitude, adoption or rejection, implementation, and confirmation. Rogers described *implementation* as the process of employing and determining the usefulness of the innovation, depending on the situation. Rogers explained that marketing managers are interested in the DOI process because they could determine if a product will be successful or a failure. For this reason, Rogers concluded that business leaders should understand the diffusion process to guarantee that they correctly manage the dissemination of a new product.

Theme 2: Reducing OOH Advertising

The second theme that emerged from data analyses was that reducing OOH advertising is a critical step to enter the U.S. market. Lai, Cheng, and Lansley (2017)

defined OOH advertising as focusing on marketing using billboards and posters in public spaces. From the analysis of data collected from semistructured interviews, all three leader participants mentioned OOH advertising during their interviews. The three study participants stated that reducing the use of OOH advertising had a substantial impact on the marketing strategies participants used. I found that by reducing OOH advertising, the three participants focused more on digital advertising, such as Facebook pages. Voorveld, Araujo, Bernritter, Rietberg, and Vliegenthart (2018) concluded that only Facebook advertising directly influences Facebook page "likes." Voorveld et al. also found that OOH media impacts organic reach, which is the number of people shown an advertisement for free, as well as viral reach, which is the number of people referred to by an ad from a peer.

P1, P2, and P3 articulated that they do not use much OOH advertising for marketing their smartphones. P1 explained that O1 focuses mostly on the digital side of marketing because digital marketing yields the most revenue. P1 noted that O1's customers focus more on social media than on OOH advertisements. P1 stated that "a less percentage [of the marketing budget] would be using the traditional and OOH marketing. In today's world, since interfaces and everything is digitalizing, everyone is switching from traditional to digital side." O1 only allocates a small percentage of its marketing budget on billboards, public transit ads, and digital screens that customers can see from the highway. P1 understands that within O1, the younger employees were, the more accepting of digitized marketing. However, older and more experienced employees preferred OOH marketing methods.

P2 emphasized that pricing is the number one strategy of O2, as O2 targets customers that make less than the average income. O2 wants its smartphones to be affordable at a low cost. P2 explained that product branding and recognition is the second strategy of O2. Both of these strategies entail advertising, though mostly on digital platforms. P2 mentioned that O2 does not use expensive television advertisements or billboards, which are standard OOH advertisements. O2's leaders see larger sales from digital marketing and, therefore, focus most of their marketing budget on social media ads.

P3 discussed the acceptance of O3's marketing strategies by O3's employees. Similar to O1 and O2, O3's leaders only use a minute's worth of OOH advertising. P3 stated that "my company doesn't do a lot of advertising. Not expensive television ads or billboards everywhere." P3 explained that within the marketing department at O3, the younger employees, including those that classify themselves as millennials, Generation Y, and Generation Z, are more than willing to accept digital marketing over OOH marketing. Older employees are used to the older OOH advertising methods, such as billboards and newspaper ads.

O1's corporate magazine's author wrote an article in 2016 related to mobile ads producing large revenues. In the 2016 article, the author explained that companies broadcast television ads as part of a television show for public consumption, but a mobile phone ad can directly target the user of that mobile phone based on the user's internet activity. This statement correlates with the reduction of OOH marketing that O1 is implementing. Business leaders at O1 wrote a white paper about crowdsourcing. The

authors of this white paper explained that O1's leaders believe that crowd-sourcing is a vital tool. Ikediego, Ilkan, Abubakar, and Bekun (2017) defined crowd-sourcing as the combination of efforts from various sets of individuals either volunteering or working part-time for socioeconomic production. In this white paper, O1's goal is to acquire new advertising sites; rely on municipalities that own traditional street infrastructure, such as lampposts; and broaden the reach to include private landlords and owners of other street furniture, such as billboards and bus shelters. O2's corporate magazine authors wrote that, in the creation of a brand, O2's leaders refer to the models of similar successful companies and billboards and event marketing. O2's magazine authors explained that O2's brand name might appear in billboards, TV, and newspapers in some countries, but not as much as in previous years. Business leaders at O2 predicted the decline of OOH ads and the rise of digital ads in 2006. In a 2006 article in O2's company magazine, the authors mentioned that the traditional advertising media platforms include TV, outdoors, Internet, newspaper, radio, and more. The authors also explained that digital advertising, including advertising on demand, would drive telecommunication networks forward and improve the profitability of network carriers soon, which confirms P2's statements regarding the reduction of OOH advertising within O2 in 2020 and beyond.

Correlation to the literature. The findings noted in Theme 2 align with Voorveld et al. (2018) in that OOH advertising has a positive effect on organic reach. Still, digital advertising has a more significant impact on building a customer base for a variety of different brands. Voorveld et al. explained that television advertising is the only offline method that is a driver of viral reach. Voorveld et al. concluded that

Facebook advertising is the most effective method to draw users to a company's
Facebook page.

Wilson and Till (2011) reported that public pressure and government regulation
had begun to eliminate or curtail outdoor OOH advertising locations, which led to
business leaders questioning the effectiveness of outdoor OOH advertising sites. Wilson
and Till concluded that the location of OOH advertising does not impact the advertising
effectiveness and that OOH advertising is generally losing its appeal to new digital
marketing efforts. Lai et al. (2017) discovered that digital OOH advertising methods,
such as digital billboard screens in public, make outdoor advertising more flexible. Lai et
al. found that digital billboards should be in the right place to target a particular audience
to be more effective. However, this is very difficult in OOH advertising because it is
challenging to gather detailed data on potential audiences in public places, mainly if this
audience changes each day.

Correlation to the conceptual framework. Theme 2 relates to Rogers' (1962)
DOI theory, which is the conceptual framework used in this study. Rogers explained the
process that an idea or product gains momentum and diffuses through society over time,
resulting in critical masses adopting this new idea. Rogers defined adoption as something
that a person does differently than that person did previously. Rogers expounded that the
key to adoption is that people must perceive the idea or product as new or innovative, and
then diffusion is possible.

The use of OOH advertising was prevalent in previous decades before the dot-
com boom around the year 2000. In 2020, all successful companies have an online

presence, and most have smartphone apps and social media pages, such as Facebook and Twitter, for their businesses. Reducing and eventually eliminating OOH advertising is an innovation that follows Rogers' (1962) bell-curve adoption model. In this study, O1 and O3 are examples of employees, mostly the younger employees, fitting into the first half of Rogers' adoption curve as innovators, early adopters, and early majority, all in favor of reducing OOH advertising and focusing on digital marketing. The older employees at O1 and O3 fit into the second half of Rogers' adoption curve, as late majority and laggards because they were reluctant to transition away from OOH advertising.

From the five main factors that influence the adoption of an innovation (Rogers, 1962), two main factors are important. *Trialability* is the extent to which the innovation can be tested or experimented with before a person commits to adopt it. *Observability* is the extent to which innovation provides tangible results (Rogers, 1962). Generally, OOH advertising has a high cost for trialability because once an advertisement is completed and put on a billboard, in a newspaper ad, on a public train or bus, or in a television commercial, it is difficult to edit or remove if needed (Wilson & Till, 2011). Lai et al. (2017) noted that digital ads allow for more flexibility. Lai et al. also discussed that the development of digital OOH advertisements with digital billboards enables companies to respond to changes in their audiences across time.

Theme 3: Increasing Digital Advertising

The third theme that emerged from data analyses was that increasing digital advertising is an essential step to enter the U.S. market. Voorveld et al. (2018) mentioned that online methods are a more significant advertising driver than offline advertising

methods. Voorveld et al. added that television is the only offline method that is just as effective as online methods, such as website and app ads.

From the analysis of data collected from semistructured interviews, all three leader participants mentioned digital advertising during the interviews. Increasing the use of digital advertising has a substantial impact on the marketing strategies study participants used. The three study participants claimed that by increasing digital advertising, participants could focus more on digital advertising, such as Facebook pages.

P1, P2, and P3 articulated that digital marketing is the most effective advertising method for their smartphones. P1 explained that O1 focuses mostly on the digital side of marketing, including websites and mobile apps, in the United States and several Asian countries. P1 mentioned that the majority of O1's customers respond more to digital marketing. P1 noted that O1 uses a combination of apps, YouTube commercials, and social media pages for advertising. P1 emphasized O1's reduction in OOH advertising and increase in use of digital marketing. P1 stated,

> Out of the overall strategy, a very small percentage is using out-of-home marketing advertising. In terms of billboards, out-of-home screens, digital screens. Our strategy uses less because people are more on their phones. Out-of-home is what you see in advertising on billboards, digital screens, the traffic lights, trains, and buses are out-of-home marketing.

O1 manufactures different series of smartphones and each series caters to a specific market. One of O1's series is a set of lower-end smartphones designed for low-income customers, such as teenagers and college students. P1 explained that these low-

income customers are more likely to use Twitter, TikTok, and Facebook, because "the [company phone series] is a lower end product. This is considered a lower end smartphone. The target audience for that particular product would be . . . high school or university kids . . . Those people are mainly on Twitter, Facebook, and TikTok." Therefore, O1's business leaders focus their marketing efforts for these lower-end smartphones on social media websites and mobile apps platforms to reach the largest audience possible. P1 indicated that O1's biggest hurdle is the absence of Google services in its smartphones. Google services are very popular in the United States and customers prefer using Google Maps, Gmail, the Google Play Store, Google Translate, and many other Google services (Guttmann, 2020). As previously mentioned, the absence of Google services is one of O1's main barriers to enter the U.S. market. P1 advises customers to seek out third-party services to jailbreak their smartphones if they insist on using Google services.

P2 discussed that, with Facebook advertising, O2 can take a small budget and be very selective on the audience it targets, which is not possible with television and OOH ads. P2 explained that O2 uses its small marketing budget and focuses on specific Facebook users that will likely be interested in its products. P2 used the term *grassroots* several times during the interview. P2 said that O2 uses grassroots methods in a community, such as in-store field programs and customer reviews and recommendations to its peers, to promote its smartphones. P2 related grassroots programs to digital marketing by explaining that, once customers are on a website or app to purchase a smartphone, customers have already made their decision. Therefore, business leaders at

O2 use targeted ads on websites and apps based on users' browsing and search history.

P2 understands that customers that see a television ad may or may not have plans to buy a

smartphone in the next two months. However, customers on a website or app, specifically

looking for smartphones, are more likely planning to make an immediate purchase.

Therefore, targeted digital ads have proven to be more effective for O2 than television or

OOH marketing ads.

P3 accentuated that O3's smartphones are much cheaper than Apple or Samsung

smartphones. Business leaders at O3 target their smartphones toward a younger audience

and, therefore, advertise on Facebook, Twitter, and other social media apps that younger

people use. P3 explained that O3 must first have the correct price that makes potential

customers more willing to purchase. P3 mentioned that the public does not know O3's

brand as well as they know the Apple and Samsung brands and, thus, O3 uses digital

marketing to promote its brand. P3 mentioned that O3 spends 70% of its marketing

budget on digital marketing, which has proven more profitable than OOH marketing. P3

added that at O3, the younger employees growing up with social media and the internet

are more accepting of digital marketing. The older employees prefer OOH marketing. An

advantage that O3 has over O1 is that O3 has Google services on its smartphones. P3

says that the Google services feature is attractive to U.S. customers and is a feature that

can help O3 compete with the larger Chinese smartphone organizations, such as O1.

The authors of the 2017-2019 O1AR, O2AR, and O3AR, emphasized the current

digital transformation of their companies and the use of digital advertising. In O1's

corporate magazine article related to mobile add bringing more revenue, the author stated

that, during the past 30 years, ad revenues have been climbing at an average annual rate

of 40%. The author mentioned that mobile phones provide an interactive medium with

virtually unlimited opportunities for targeting and personalizing. Business leaders at O1

published an article in O1's company magazine about harnessing subscriber information

to the company's advantage. In this article, the author discussed that O1 has over 500

milling Facebook users and O1's leaders know those users' relationships and interests. In

that same article, the author discussed using Facebook, and other social media websites

and apps, as the main avenue for O1's smartphone advertising. In an official company

publication related to the growing technological challenges that companies are facing, O2

discussed sizeable social network companies, such as Google, WhatsApp, and Facebook

entering the market and offering their services to O2's customers. Business leaders at O2

see this event as an opportunity to expand their advertising on these social media

platforms to increase their customer base.

Correlation to the literature. The findings noted in Theme 3 align with Lai et al.

(2017) in that digital advertising is more effective than OOH advertising. Lai et al.

discovered that digital OOH marketing is an excellent way to merge traditional OOH

marketing with the digital era of internet and social media advertising.

The findings in Theme 3 also align with Giones and Brem's (2017) study. Giones

and Brem defined *going digital* as converting analog information into the computer-

readable bits. Giones and Brem noted that most people now use going digital to refer to

the way products and services are more computerized. Giones and Brem discussed that

digital technology covers smartphones and other smart devices while building on existing

technologies. Giones and Brem focused on business leaders using products and services on the internet, running in the cloud, and using apps to stay ahead of competitors. P1, P2, and P3 use digital technology for advertisements to target specific customers that may purchase smartphones. P1, P2, and P3 focus on smartphone apps, websites, social media, and digital OOH ads to sell their products. All three leader participants agreed that Facebook is the best avenue for digital marketing in the United States. Using Facebook is a logical choice for business leaders and their U.S. marketing teams because Facebook is the largest social media site in the United States (Clement, 2020).

Correlation to the conceptual framework. Theme 3 relates to Rogers' (1962) DOI theory, which is the conceptual framework used in this study. Rogers explained that DOI is similar to sharing internal knowledge and the spreading of new ideas. Rogers explained that, when an organization diffuses information, organizational leaders are communicating information through various channels within the business over time. Rogers explained several characteristics of the innovation-decision process: knowledge of the innovation, formulation of an attitude, adoption or rejection, implementation, and confirmation. P1, P2, and P3 discussed during their interviews that the idea of digital marketing went through each of Rogers' steps in the organization. Business leaders at O1, O2, and O3 diffused digital marketing ideas via various channels and received different feedback from their employees. While the older employees were more reluctant to switch from OOH marketing to digital marketing, the younger employees were more willing to make the switch.

Rogers (2002) identified four main elements that influence the spread of new ideas: innovation, communication channels, time, and the social system. In O1, O2, and O3, business leaders needed to communicate the innovation of digital marketing with employees that preferred using OOH marketing. In the year 2020, digital marketing has become more prevalent in society than 30 years ago. The business leaders of O1, O2, and O3 have adapted their advertising model to these changes. Rogers stated that innovation has several characteristics, including observability. P1, P2, and P3 all mentioned that they observed an increase in sales when they increased their digital marketing.

Theme 4: Optimizing Phone Specifications to Meet Customer Needs

The fourth theme that emerged from data analyses was that optimizing phone specifications is an essential step to enter the U.S. market. Attri et al. (2017) concluded that hardware specifications, battery life, apps, and price, have the most significant impact on customers' decisions to purchase smartphones. Attri et al. also found that digital marketing, brand image, and brand loyalty, all influenced customers making purchases. From the analysis of data collected from semistructured interviews, two leader participants, P2 and P3, mentioned phone specifications. P2 and P3 both mentioned low price, good quality, apps, and technical specifications as important marketing strategies of their smartphones. I found that by providing a low and affordable price, good quality, and hardware and software specifications that meet the customers' needs, these Chinese smartphone companies will increase their sales of smartphones in the United States.

As I previously stated, P1 mentioned that one of O1's significant barriers to entry is the lack of Google services. P1 implied that O1's customers are satisfied with all the

other features of its smartphones. P2 determined that the U.S. market is price sensitive only in a specific demographic. P2 suggested that Samsung and Apple take most of the high-end smartphone sales from the middle class and the wealthy population of the United States. P2 explained that O2 focuses on the other demographics, which P2 referred to as the underserved market. P2 stated,

> The U.S. market is price sensitive only in a certain demographic. So…in the U.S., Samsung and Apple take the majority of the of the [high end] sales . . . And then there's other demographic, particularly with those that might not be have supportive credit that are purchasing through prepaid channels. I think that those are not necessarily the textbook buyers of a flagship or Apple. So a marketing strategy to go after what's called the underserved. You know, those that want a great phone but might not have a thousand dollars to spend on a high end selection.

P2 elaborated that the undeserved customers may not have high credit scores and will purchase lower-cost phones and prepaid phone plans. P2 said that these underserved customers are not necessarily the buyers of Apple or Samsung phones. P2 has researched the underserved market and concluded that those customers want a great phone but might not have a thousand dollars to spend on a high-end selection. P2 emphasized that O2 understands that customers want smartphones to take good pictures, open their email, make phone calls, and do everything else that high-end smartphones can do. Therefore, O2 will sacrifice higher quality hardware to be able to afford to implement these features. This sacrifice keeps the production cost of smartphones down so that O2 can sell its

smartphones to the underserved market and still make a profit. P2 concluded that price is

O2's number one priority for marketing its smartphones in the United States. I previously

mentioned that Christensen et al. (2015) defined a disruption as a process in which a

small company, which likely has very few resources, can successfully challenge more

established incumbent companies. Christensen et al. emphasized that successful

disruptive companies will target the market's needs that are overlooked by larger

companies. These companies will then deliver a more suitable product at a lower price,

which O2 is presently doing.

Like P2, P3 also stated that pricing is the primary marketing strategy of O3 and

that O3 must have the correct price first. P3 explained that the O3 employees are satisfied

that customers can get a good phone at a low price that can do the same thing that more

expensive phones like Apple and Samsung can do. O3 focuses its marketing on digital

platforms to target customers that cannot afford more costly phones like Apple and

Samsung, which is similar to O2's strategy. P3 noted that one advantage that O3 has over

its competitors, such as O1, is that O3 has Google services on its smartphones. Most U.S.

customers prefer to have Google services on their smartphones (Guttmann, 2020). In

addition, P3 provided a detailed explanation of the technical specifications that O3

promotes to its customers. O3 will market its smartphone specifications compared to

similar models of competitors, such as the lighter weight of some of O3's smartphones.

P3 informs customers that some of O3's smartphones include the 3.5 mm headphone jack

that Apple removed from its latest iPhones to make way for wireless technology (Simon,

2019) and other hardware (Chamary, 2016). P3 stated,

The [company name and model of smartphone] compared to IPhone 11, our phone is lighter, has the 3.5mm headphone jack, microSD slot, and dual SIM card slot. Also, some of our smartphones have more battery life than Apple and Samsung phones. We also provide good warranty on our products.

The authors of the 2017-2019 O1AR, O2AR, and O3AR discussed the new features and technologies their companies implement with each newly launched smartphone. The authors of the 2019 O1AR explained that one of O1's current goals is to have vehicle-to-everything (V2X) by the year 2025. V2X is 5G-based vehicle services, such as GPS and other 5G communication technologies. Business leaders at O1 believe that 15% of vehicles will have 5G-based autonomous driving by the year 2025. O1's leaders are presently introducing 5G capabilities in all of O1's smartphones. In addition, because the authors of the 2019 O1AR stated that 90% of people will have smart personal assistants by 2025, O1 is including this feature on all new high-end smartphones. The authors of the 2019 O2AR wrote that they want to add Internet Protocol Television (IPTV) capabilities on their smartphones. O2 described IPTV as a new technology that utilizes the cable TV network and integrates Internet access, multimedia, and communications in one device. P2 mentioned that O2 focuses on low-cost smartphones. The authors of the 2019 O2AR also discussed providing customers with long-distance data transmission, longer battery life, larger memory capacity in their smartphones, and a low price. This confirms P2's responses about offering customers quality smartphones with the same capabilities as Apple and Samsung phones, but at a lower price. The authors of the 2019 O3AR described several technologies that O3 focuses its research

and development work in 2020, based on customer demand. These goals include 5G

technology, the Internet-of-things (IoT), and artificial intelligence. The authors of the

2017-2019 O1AR, O2AR, and O3AR; company white papers; and other company

publications from O1, O2, and O3 explained that the participating organizations will

continue to use more digital marketing for advertising their new smartphone technologies

to the public.

   Correlation to the literature. The findings noted in Theme 4 align with several

research findings. Christensen et al. (2015) identified Uber as not an entirely disruptive

company because Uber did not target low-end underserved customers. Instead, Uber

targeted customers already interested in ride-sharing and customers that take taxicabs,

which have prices similar to Uber. O2 and O3 target low-end underserved customers, but

O1 does not. Simultaneously, O1 targets high-end customers, but O2 and O3 do not. In

which case, neither of these three organizations could be entirely disruptive. Almquist

(2016) defined 30 things that customers value in smartphone innovations, including

connectivity, saving time, and organization. Kim et al. (2016) discovered that a

smartphone's aesthetic appeal and price have the most significant influence on customer

satisfaction, and specifications and functions were second. Schumpeter (1939) explained

that businesses could increase profits by reducing production costs or increasing the

product's demand. O2 and O3 reduce their production costs by using lesser quality

hardware in their smartphones than O1, Apple, or Samsung uses. O2 and O3 increase the

demand for their smartphones by focusing on low-end markets and promoting the

technical specifications of their phones. With these marketing strategies, Chinese

smartphone makers can outpace Apple in both value and price, which is already

occurring in much of the world (Zhong, 2019).

Correlation to the conceptual framework. Theme 4 relates to Rogers' (1962)

DOI theory, the conceptual framework used in this study. Rogers explained that the

earlier adopters are the first ones to purchase a new product. These early adopters are

consumers that are more innovative than others, willing to pay a premium price for the

new product and take a risk on unproven technology. O1 sells its smartphones at a higher

price than O2 and O3. According to Rogers, the early adopters that purchase O2 and O3's

smartphones are more risky than other consumers. Rogers' explains that companies that

make technology products like smartphones usually first target price-insensitive markets

such as early adopters. Later, those companies will target the price-sensitive markets,

such the late majority and laggards in Rogers' DOI bell curve. O1 tends to follow

Rogers' theory, while O2 and O3 tend only to target the price-sensitive underserved

market as their marketing strategy.

Rogers (1962) identified the social system as the fifth essential element in

diffusion research. Rogers explained that the social system includes external influences

on potential adopters of technologies. These influences include media marketing,

government mandates, and peer reviews of products. Rogers identified confirmation and

continuation as the fifth stage in the adoption process, which involves the decision to

continue with innovation. P1, P2, and P3 all explained that their organizations use the

social system to decide the best way to market their smartphones. Digital marketing,

government restrictions, and customer feedback all fall into Rogers' social system

element of innovation diffusion. As O1, O2, and O3 decide to continue with a marketing effort, they will use customer feedback such as the price and technical specifications that customers prefer. This customer feedback, coupled with the social system, shows that Theme 4 correlates with Rogers' DOI theory to optimize profits for Chinese smartphone companies entering the U.S. market.

Applications to Professional Practice

Business leaders in the smartphone industry can use the results from this study to enhance their marketing strategies and improve their overall business practices. Business leaders can also use the results of this study to retain and increase their customers in the United States. The participants of this study were business leaders of Chinese smartphone companies. These business leaders were at least 18 years of age, spoke good English, and had at least 5 years of experience in marketing or global sales and in expanding sales into the United States successfully. The success of the three participating Chinese smartphone companies comes from business leaders executing effective marketing and advertising strategies. All three participants in this study indicated the importance of following the four themes in creating successful marketing strategies: removing barriers to entry, reducing OOH advertising, increasing digital advertising, and optimizing phone specifications to meet customer needs. The participants reflected the aspects of the DOI theory throughout their responses. Rogers (1962) explained that those in marketing are engrossed in the DOI process because it can control the success or failure of a product. Rogers emphasized the importance of marketers having a solid understanding of the DOI process to manage the dissemination of new products successfully.

The first theme that emerged from this study was removing barriers to entry into the U.S. smartphone market. I found the following subthemes as barriers to entry: brand recognition, carrier and distribution networks, and marketing budget. Business leaders should recognize that customers prefer to make purchases from brands that they perceive as reputable. Brand image is an essential factor in increasing the customer base (Attri et al., 2017; Chen & Fan, 2017). In the United States, customers prefer the Google brand as a technology service, leading to Google having one of the largest customer bases in the country (Guttmann, 2020). Business leaders of smartphone companies should also recognize that U.S. carriers have a significant influence in the cell phone market and those leaders should strive to work closely with U.S. carriers. O2 and O3 work closely with the U.S. carriers to sell their smartphones and P2 and P3 expressed their satisfaction with their companies' profitability obtained from working with U.S. carriers. Business leaders should manage their marketing budgets effectively by allocating the most funds in the advertising avenues that generate the most revenue (Eggers & Kaul, 2016).

The second theme that emerged was reducing OOH advertising. The second theme supports the third them that emerged, which was increasing digital advertising. All three participants repeatedly explained that they have reduced the use of OOH advertising and increased the use of digital advertising. Voorveld et al. (2018) explained that organizations that use OOH reach many potential customers at a cost to the organization, but free for those customers. Voorveld et al. clarified that, even though OOH advertising reaches many customers, digital advertising is more effective for building a customer base because digital advertising is geared towards customers' specific wants and needs.

Voorveld et al. confirmed that television is the only productive-offline, nondigital OOH advertising method. Wilson and Till (2011) confirmed that companies are reducing OOH advertising due to public pressure and government regulations. Lai et al. (2017) also suggested that digital advertising is more effective than OOH advertising. Chong et al. (2017) concluded that online digital marketing significantly influences customer demand for products. Chong et al. also determined that customer reviews are equally important in determining customer demand. Business leaders may use the results of this study to understand that less OOH and more digital advertising will be the most effective method to build a customer base.

The fourth theme that emerged from the analyses of data collected was optimizing phone specifications to meet customer needs. From interviewing the three business leaders, I found that promoting a reasonable price and specific smartphone features helped increase Chinese smartphone companies' market base. Attri et al. (2017) concluded that smartphone hardware and software specifications have the most significant impact on customers' decisions to purchase smartphones. Attri et al. also found that digital marketing and brand recognition influence customers' decisions to make a purchase, which confirms the themes and findings of this study. Business leaders can use the information from this study to enhance their marketing efforts by promoting the technical specifications of their products that customers desire.

Implications for Social Change

This study's implications for social change may include business leaders obtaining guidance on methods to positively impact their communities. Reducing

business failures may increase job opportunities and decrease unemployment rates, which

will lead to positive social change due to more people out of poverty, earning money, and

paying taxes to the community. An increased in the local community's tax base could

translate into more financial resources to improve parks and community-based

organizations. Business leaders can use this study's results to understand the importance

of improving marketing strategies to reduce customer attrition, which may reduce the

number of business failures. When businesses increase sales and succeed financially, they

pay more local taxes that communities could use to fund more local services. The

findings on successful marketing strategies emphasize that business leaders should

understand that these strategies might lead to overall customer satisfaction with their

products and improve the customers' daily lives.

The findings on brand recognition may provide business leaders with an

understanding of the significance of developing a positive brand image aligned with the

customer's personality, thus increasing customer satisfaction with a product that could

make the customer's daily life more comfortable and entertaining. Technology controls

every aspect of everyday life (Younes & Al-Zoubi, 2015). People now make payments,

manage businesses, view entertainment, control home smart systems, control security

systems, and do more things using their phones (Younes & Al-Zoubi, 2015). In this

study, I found that customers desire a smartphone that can check email, browse the

Internet, and perform other daily functions, but at a low price. I also found that not

everyone can afford the newest and most expensive smartphone. Business leaders can use

this study's findings to market alternative options that are just as effective, cheaper, and

suitable to make customer's daily lives more accessible and satisfying. This study's findings on marketing strategies may further highlight the significance of understanding that building customer relationships benefits all stakeholders and creates a stable positive economy.

Recommendations for Action

Based on the findings of this study, I concluded that business leaders should focus on reducing customer churn rate and simultaneously attracting new customers. The target audience that can benefit from this study is foreign smartphone companies that desire to increase their market share in the United States. Business leaders, community leaders, and other stakeholders may find this study's results useful for maintaining sustainability in a foreign market. If I were to circulate this study's findings to a broader audience, I would publicize a summary of the findings on an international media outlet to reach as many global business leaders as possible.

I am making four recommendations that business leaders should follow based on what I identified in this study, which are (a) building brand recognition to remove barriers to entry, (b) investing more marketing dollars in digital advertising and less in OOH advertising, (c) focusing on forming excellent interpersonal relationships with customers and the community, and (d) optimizing phone specifications. All four recommendations may lead to an increase in profits for businesses.

The first recommendation is for business leaders to build brand recognition. The lesser-known companies should focus on building their brand name to develop customer retention and increase brand loyalty. P2 and P3 are business leaders at lesser-known

Chinese smartphone companies and both explained that their goal is to promote their

brand to get more established in the U.S. market. Chen and Fan (2017) discussed the

significance of brand image in any business. Customers prefer to purchase products and

services from brands they positively recognize, such as technology giant Google, which

is one of the largest companies in the United States (Guttmann, 2020). By improving

brand image and recognition, business leaders may gain new customers and increase

customer loyalty.

The second recommendation is for business leaders to investing marketing dollars

in the most profitable areas. Attri et al. (2017) described the effectiveness of marketing

communications on customers purchasing smartphones. I found that the most profitable

advertisement avenues are digital platforms, such as websites and social media apps. For

example, O3 spends 70% of its marketing budget on digital marketing and the remaining

30% on OOH marketing and other advertising methods, such as field programs. By

allocating marketing dollars to the most profitable advertisement avenues, such as

websites and social media, business leaders may see an increase in sales and profits.

The third recommendation is for business leaders to focus on forming excellent

interpersonal relationships with customers and the community. Bone et al. (2017)

explained that customers are more likely to make purchases in a retail store if the store

staff greet the customers positively and the customers receive excellent service. Cross-

selling additional products and services can build interpersonal relationships with existing

customers (Wang & Keh, 2017). However, this method does not always increase profits

(Shah & Kumar, 2012). O2 and O3 have had success conducting field programs at

distribution centers, and P2 explained that the grassroots method that O2 uses is improving O2's relationship with the local communities. By striving for forming excellent customer relationships and delivering outstanding customer service, business leaders can increase customer retention.

The fourth recommendation is for business leaders to focus on optimizing phone specifications. Attri et al. (2017) explained that in addition to digital marketing and brand image, hardware specifications and prices will influence customers' decisions to purchase smartphones. P2 and P3 mentioned that customers want a smartphone with a low price, good quality, and popular apps. P2 and P3 also said that pricing is their primary marketing strategy. P2 explained that the O3 employees are satisfied that customers can get a good phone at a low price that can do the same things that the more expensive phones do, such as Apple and Samsung. P3 explained that O3 advertises its smartphones' warranties and long battery life. Business leaders should market to their customers' desired hardware specifications, software and app specifications, and the right price that customers are willing to pay, while maintaining a profitable margin.

Recommendations for Further Research

One limitation of this qualitative multiple case study is the sample size of participants, which consisted of three business leaders of Chinese smartphone companies. These business leaders were at least 18 years of age, spoke good English, and had at least 5 years of successful experience using global marketing strategies to increase sales in the United States. Expanding this study to include more business leaders of different foreign smartphone companies may introduce additional marketing strategies. Conducting a

quantitative study is another recommendation for future research. Quantitative

researchers may use a survey to generate numerical measures to compare, rank, and

select data to support their decisions (Saunders et al., 2016). In quantitative studies,

researchers will also use controls to ensure validity and set clear questions and

hypotheses (Saunders et al., 2016). Quantifying successful marketing techniques could

help business leaders reach more potential customers through advertising, which may

lead to an increase in profits.

P2 and P3 mentioned that in-store field programs proved to be an effective

marketing strategy. With these in-store field programs, the employees at the retail stores

interact with the customers to promote and demonstrate the new smartphones' features.

Bone et al. (2017) and Kim et al. (2016) concluded that customer service substantially

influences customer demand. Bone et al. concluded that the aesthetic appeal of a store

and the customer service representatives' affability will lead to positive feedback from

customers about their shopping experience. The combination of effective marketing and

positive customer service can increase customers' likelihood of making initial and repeat

purchases (Bone et al., 2017). Therefore, future researchers could study customers'

feedback to determine the impact of the customer service they received on customers'

decisions to make a purchase. Customers often leave reviews on websites and apps after

making a purchase. Chong et al. (2017) identified that customer reviews significantly

affect customer demand for online products and that customer retention is essential for a

business to survive. By improving customer service, business leaders could see more

positive customer reviews on their apps and websites, which would lead to more customers and more sales.

Reflections

I conducted this qualitative multiple case study to explore the marketing strategies that Chinese business leaders can use to increase the sales of smartphones in the United States. Similar to most of the public, I am the owner of a smartphone. I lived in China for a few years and witnessed the popularity of Chinese brand smartphones, though these brands are not as prevalent in the United States. From this study, I gained insight into the significance of specific marketing strategies that leaders of Chinese smartphone companies use to increase their U.S. customer base.

I conducted this qualitative multiple case study following the data collection methods outlined in Section 2, which allowed me to learn about different effective marketing strategies while in a comfortable atmosphere. Initially, I was concerned that I would not have an adequate sample size to guarantee that I would reach data saturation. Many business leaders did not respond to my requests to interview them and others were reluctant to participate after I informed them of the questions that I would ask them. There was a potential cold war developing between the United States and China during this study (Gladstone, 2020). China and the United States were having conflicts on trade, 5G, social media spying, economic and national security espionage, and many other sensitive topics (Jaisal, 2020). These issues may have contributed to the reluctance or trepidation of potential participants.

At first, one business leader was willing to participate and later withdrew from the study, after deeming my interview questions as very sensitive. Another business leader responded to my interview questions with short answers via email. Then, that business leader stopped responding when I explained that I needed to conduct the interview in person or through teleconferencing. There was also the global COVID-19 pandemic that commenced during the start of my case study and closed down businesses, cities, and countries worldwide. This pandemic likely altered the feasibility of potential participants having time to be part of my study.

All three participants in this study were willing to participate and responded openly to my questions. The three business leaders understood the notion of developing marketing and advertising strategies including brand recognition, digital marketing, and phone specifications. I appreciate that the participants were willing to share their time and experiences with me. The most important thing that I learned as a researcher is that qualitative research involves meticulous data analysis and communication with participants. I followed the interview protocol (see Appendix B) and performed member checking by giving participants my interpretation of their answers to interview questions and asking them to verify the accuracy of such interpretations. I analyzed the company documents of participants to be able to conduct methodological triangulation, using data collected from conducting semistructured interviews and analyzing organizational documentation and artifacts. Reflecting on the data analysis process, if it were not for the lockdown and restrictions in my region due to the COVID-19 outbreak, I would have conducted face-to-face interviews instead of telephone and video conferencing

interviews. I believe that the in-person interviews would have been more personal and the participants would have shared more information.

Conclusion

From conducting this study, I learned the importance of marketing strategies for Chinese smartphone companies to increase their sales in the United States. The Chinese smartphone companies' business leaders that participated in this study emphasized that they use these marketing strategies to gain a competitive advantage. These business leaders understand that appealing to a target audience is essential to the success of their organizations.

The purpose of this qualitative multiple case study was to explore marketing strategies that Chinese smartphone marketing business leaders use to increase sales of their smartphones in the United States. In this study, I discovered that Chinese smartphone companies in the United States use four strategies to retain and gain more customers. The four strategies that emerged from the study were (a) removing barriers to entry, (b) reducing OOH advertising, (c) increasing digital advertising, and (d) optimizing phone specifications to meet customer needs. Within the first theme, the three subthemes that emerged were the companies' brand recognition, carrier distribution networks, and marketing budget.

All three participants agreed that they need to remove barriers to entry. All three participants agreed that they should focus their marketing budget on more digital advertising, such as websites and social media, to target specific users that may be interested in a particular smartphone. All three participants agreed that they should

allocate less marketing funds to OOH advertising, which reaches a broader audience that may not be interested in a smartphone that the company is advertising. All three participants emphasized that they need to optimize phone specifications by promoting a good price and the technical features of their smartphones that customers desire. From conducting this study, I learned the importance of maintaining awareness of innovations in advertising.

This multiple case study was a method to gain knowledge from Chinese smartphone business leaders about the marketing strategies they used to increase sales in the United States. The consensus among the business leaders that participated in this study was that effective marketing strategies are essential for company growth. I learned from this study that business leaders should always include marketing strategies in their vision of business growth, if they plan to increase their customer base, maintain their current customers, and increase profit. This study's findings can be beneficial to all foreign smartphone companies that desire to achieve financial success in the United States. Finally, future research focusing on excellent customer service and using marketing strategies through a quantitative study may create additional knowledge to assist business leaders in increasing their customer base.

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Appendix A: Interview Questions

1. What marketing strategies have proven successful to increase sales of smartphones in the United States legally?

2. How did your employees respond to those marketing strategies?

3. How are marketing strategies to legally increase sales of smartphones in the United States effectively communicated throughout the organizational ranks and among stakeholders?

4. What were your key marketing strategies to increase sales of smartphones in the United States legally?

5. What are some of the consequences of not having marketing strategies to increase sales of smartphones in the United States legally?

6. What were the key barriers to implementing your organization's strategies to increase sales of smartphones in the United States legally?

7. How did your organization successfully address the key barriers to increase sales of smartphones in the United States legally?

8. What else would you like to share that I have not asked you regarding marketing strategies used to increase sales of smartphones in the United States legally?

Appendix B: Interview Protocol

Marketing Strategies That Chinese Business Leaders Use to Increase Sales of

Smartphones

The purpose of this case study is to explore marketing strategies that Chinese smartphone

marketing business leaders use to increase sales of their smartphones in the United States.

Interviewee: _____ Location: _____

Date: _____ Time: _____

Notes:

1. Greet interviewee and introduce yourself.

2. Provide overview of the study and indicate the usefulness of the outcome.

3. Obtain signed consent form. Offer to answer any questions that interviewee may

   have.

4. Remind interviewee about their volunteer efforts to participate in the study.

5. Remind interviewee about recording the interview and start the recording.

6. Start the interview by recording interviewee's pre-assigned coded name, date,

   time, and location.

7. Start asking interview questions. Allow enough time to answer those questions.

8. Listen carefully to interviewee. Ask probing and follow-up questions, if needed.

9. At the end of the interview, thank interviewee for their participation and time.

10. Provide participant your contact information if they have any questions.