

2020

## Strategies for Outsourcing Manufacturing in the Caribbean

Cindy Labossiere-Auguste  
*Walden University*

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# Walden University

College of Management and Technology

This is to certify that the doctoral study by

Cindy Labossiere-Auguste

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Walden University  
2020

Abstract

Strategies for Outsourcing Manufacturing in the Caribbean

by

Cindy Labossiere-Auguste

MBA, Strayer University, 2013

BS, The Art Institute of Philadelphia, 2008

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

December 2020

## Abstract

Ineffective outsourcing strategies fail to overcome cultural challenges. Outsourcing apparel industry leaders who fail to overcome cultural barriers negatively impact the organization's financial growth and trajectory. Grounded in the theory of constraints, the purpose of this qualitative single case study was to explore the strategies apparel industry leaders use to overcome cultural barriers when outsourcing internationally. Participants comprised 3 North American apparel company leaders who successfully implemented strategies to overcome outsourcing challenges in the Caribbean. Data were collected using semistructured interviews and reviewing company documents. Yin's 5-step approach, methodological triangulation, and thematic analysis were used to analyze the data. Three themes emerged: training and implementation, engagement in the community, and use of local talent and management. A key recommendation is apparel industry leaders should utilize local talent and engage with the community when outsourcing operations to the Caribbean. The implications for positive social change include apparel industry leaders' potential to create jobs and support the local communities' economic development.

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## Dedication

First and foremost, I would like to dedicate this study to my lord and savior, Jesus Christ, the one who guided me throughout this journey. Without his guidance, I would not have been able to make it this far. My hope for this study is to contribute to the goodness of the world and academia. I also dedicate this doctoral study to my husband, Guy; our children, Armelle and Daiden; my mom, Yolette; and my dad, Robert. My prayer is that I made you proud, Dad. I know in my heart you are smiling and celebrating with me from heaven.

I want to take this opportunity to express my sincere gratitude to my husband. Throughout this journey you have supported me and have taken the time to provide extra care for our children. By going above and beyond for me, you have allowed me to focus on completing my doctoral study. Throughout the stressful and sleepless nights, your kind words of encouragement have pushed me to keep going and not give up. I want you to know I could not have done this without your support and patience. I am thankful for the space and time you have given me, although it was not easy balancing small children, work, and school. I am forever grateful from the bottom of my heart and dedicate this study to you.

I want to share my gratitude to my mom and my children. Mom, you have been an example to me of what hard work and passion look like. As a child, I always admired that fire inside of you, the passion to help others and not give up when life gets hard. I dedicate this study to you. I would also like to dedicate this study to my two children. You two motivated me when I needed it the most.

## Acknowledgments

I want to take the time to acknowledge and express my appreciation to my chair, Dr. Matthew Knight. Throughout this doctoral journey, you have provided tremendous support and challenged me to go beyond what I thought I could do. Your feedback and honesty have allowed me to push myself and not give up. I sincerely appreciate the dedication and time you have given me so that I could accomplish this dream. The advice you have shared throughout these years I will take with me to all my future endeavors. Second, I want to thank my second committee member, Dr. Lisa Cave. I am grateful for the knowledge that you have shared with me and the encouragement that gave me confidence. Third, I want to acknowledge and thank Dr. Brenda Jack. I am thankful for your support and for the opportunity you have given me to share this study with the world.

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## Section 1: Foundation of the Study

Implementing the use of outsourcing as a strategic business tool has been applied in various industries on a global scale. Cost reduction is the primary reason organizations outsource all or part of their operations (Zhu, 2017). Organizations that are looking to outsource are deciding what production needs should be kept in-house or sent out (Dolgui & Proth, 2013). During the evaluation process, organizations identify the key challenges related to costs they face when competing in an international market (Gylling, Heikkila, Jussila, & Saarinen, 2015). Research on outsourcing indicated the challenge with relationship building between the client and service provider (Babin & Quayle, 2015). The challenges that organizations encounter are cultural barriers such as language, currency exchange, and national holidays. Organizations are looking to improve their outsourcing methods.

### **Background of the Problem**

Apparel companies have incorporated outsourcing to international manufacturers to reduce cost. Outsourcing can present cultural challenges such as differences in languages, currencies, and business practices (Wibisono et al, 2019). Managers who are decision-makers of outsourcing have failed to prepare themselves for international business practice (Nyameboame & Haddud, 2017). The apparel industry relies heavily on manufacturing by outsourced vendors. If an organization is not equipped with the proper resources and strategic planning, it is more likely to encounter major setbacks (Da Silveira, 2014). These setbacks can increase employee turnover, reduce sales, and decrease profits. Organizations can benefit from strategies that have been proven to work

for similar entities. The current study focused on the successful strategies that have been implemented by leaders in the apparel industry.

Daily challenges include differences in communication, cultural business practices, and currency exchange. The outsourcing phenomenon began to develop in the 1980s to reduce cost and increase revenue (Owens, 2014). Manufacturing leaders in the apparel industry have incorporated this strategy into their business model. Although there has been an increase in outsourcing, research has been limited in identifying the challenges that arise and the strategies to overcome those obstacles, particularly when outsourcing to the Caribbean. Research on this geographic location may benefit U.S. apparel companies who are considering outsourcing manufacturing. In this study, an apparel organization production department identified the challenges and strategies of outsourcing to an international vendor.

### **Problem Statement**

Outsourcing in the United States and globally, has grown significantly since the 1990s (Khan & Bashar, 2016). However, a loss of revenue and other unsatisfactory results can occur when organizations lack effective strategies and do not follow necessary protocols when outsourcing to different countries (Aamer, 2018). Eggert, Bohm, and Cramer (2017) stated that 60% of organizations have not experienced success with outsourcing. Outsourcing to the Caribbean requires an understanding of cultural differences such as language, currency, governmental rules, and regulations. The general business problem was that many apparel companies lack outsourcing strategies for dealing with different cultures. The specific business problem was that some leaders in

the apparel industry lack strategies that can overcome cultural barriers when outsourcing bushiness to partners with a different culture.

### **Purpose Statement**

The purpose of this qualitative single case study was to explore the strategies that leaders in the apparel industry use to overcome cultural barriers when outsourcing internationally. The population for the study was leaders in a North American apparel company that outsources internationally and has implemented outsourcing strategies. The leaders within the organization are decision-makers who are in communication with external manufacturing companies. Their positions are business owners, supervisors, production managers, and designers. These groups of individuals met the criteria of the study because they are the decision-makers within their departments.

Findings may be used to provide employment opportunities in the Caribbean. An increase in employment opportunities may improve the living conditions of families in this region. Providing jobs may help build communities and allow opportunities for advancement. Furthermore, implementing successful strategies may improve working relationships with potential clients and promote development in the region.

### **Nature of the Study**

I chose a qualitative single case study design. Qualitative studies often focus on the *why* and *how* aspects of behaviors and provide an in-depth understanding behind the decisions that are made based on open-ended questions (Barnham, 2015). Qualitative studies encompass valuable components that provide a robust exploration of a research topic (Barnham, 2015). Qualitative studies include data from subject matter experts so the

end user can apply the findings (Bailey, 2014). The purpose of the qualitative study was to provide a deeper understanding of successful outsourcing strategies used in different regions of the world and how those methods can be applied in the Caribbean. The study also provided a holistic view of how to overcome cultural barriers. The other research methods I considered were quantitative and mixed methods. A quantitative method involves testing hypotheses and analyzing numerical data (Barnham, 2015). I decided against a quantitative approach because I was not examining the relationship between variables. A mixed-methods study incorporates qualitative and quantitative methodologies (Fetters, Curry, & Creswell, 2013). Applying two methodologies to the study was not necessary to answer the research question.

The design that was suitable for this research was a single case study, which allows the researcher to collect content through various methods such as onsite field work, interviewing participants, and recording data. The case study provided an opportunity to interview leaders in apparel companies who implemented successful outsourcing strategies and overcame cultural barriers. The research design selected for this study enabled me to gather information from experts in the apparel industry. I considered three designs for the study, which included case study, phenomenological, and ethnographic. I decided against a phenomenological or ethnographic design. A phenomenological study focuses on participants' lived experiences and an ethnographic study focuses on the cultural experiences (Conklin, 2012), neither of which were appropriate for this study.



### **Research Question**

What strategies do leaders in the apparel industry use to maximize effective outsourcing activities and overcome cultural barriers?

### **Interview Questions**

1. What strategies did your management use to increase profitability when using outsourcing?
2. Describe barriers or constraints you encountered when you first attempted to outsource?
3. What strategies worked the best when you outsourced?
4. What strategies do you recommend to organizations attempting to implement strategic outsourcing practices?
5. How much time and money did these successful strategies save your organization?
6. How did you prepare yourself for the cultural challenges that arose when you outsourced internationally?
7. How did you train your staff to prepare for the cultural barriers that occurred when outsourcing?
8. How did you address the currency, language, rules, and regulatory differences?
9. Does your company receive tax subsidies or government tax support from the foreign country in which you are working?
10. What other questions should I ask that you found to be helpful in overcoming cultural differences?

## **Conceptual Framework**

The conceptual framework used in this study was the theory of constraints (TOC). Goldratt and Cox (1984) presented a concept that highlighted the restrictions that can prevent an organization from reaching its potential. Organizations implementing this aspect of the theory can identify what the constraints are for process improvement. Goldratt and Cox further suggested that organizations could work on identifying the internal issues and improve these areas on an ongoing basis. Goldratt and Cox suggested that organizations must continuously take the time to identify their goals and their purpose. The objective of the theory is to eliminate the issues that are a cause for concern.

TOC was suitable for this study because apparel companies want to identify the internal constraints they face when outsourcing internationally and to identify successful strategies to maximize their outsourcing activities. The TOC provided an opportunity to go beyond identifying the problem at hand. Apparel companies can follow this theory and use it as a tool to continually improve the procedures that relate to outsourcing. There is an ongoing need for process improvement. Leaders in the apparel industry can equip their staff with effective procedures when outsourcing.

## **Operational Definitions**

*Logistics*: The process of managing the functions involved in business engagement such as production, facilities management, etc. (Slepnirov, Brazinskas & Waehrens, 2013).

*Nearshoring*: A business practice in which companies outsource to organizations in nearby countries (Slepnirov et al., 2013).

*Outsourcing*: A business strategy that offers production of goods and services to organizations for a reduced cost (Lonsdale & Cox, 2000).

*Regulation*: Rules implemented by the government to ensure proper code of conduct when conducting business (Haufler, 2013).

*Service industries*: A range of external services provided by organizations include software development and customer service (Pisani & Ricart, 2016).

*Tax benefits*: Incentives to companies considering relocating part or all of their production (Brodzka, 2013).

*Tax holiday*: The suspension of taxes for new entities in emerging markets for a certain period of time (Brodzka, 2013).

### **Assumptions, Limitations, and Delimitations**

#### **Assumptions**

Assumptions in research are statements that are accepted as true without evidence (Grant, 2014). The current study included assumptions based on the components explored when identifying effective outsourcing strategies. The content provided by the participants was assumed to be truthful. The interview process was designed to promote transparency and honesty from the participants. I assumed that the organizations' leaders had enough knowledge to present factual information. I also assumed the data would provide a holistic view of outsourcing in the apparel industry. The data were collected from reliable sources who provided extensive information in this study.

Another assumption was that participants would share their outsourcing challenges and be open about their experiences. I also assumed that participants would

share the strategies implemented and would not worry about giving away too much information. In addition, I assumed that companies would share their experiences with other outsourcing companies they had engaged with in the past. These assumptions were necessary to conduct the study.

### **Limitations**

Limitations are aspects of the study the researcher cannot control (Aastrup & Halldorsson, 2013). The limitations can be viewed as the unforeseen threats to the validity of the study (Aastrup & Halldorsson, 2013). One limitation in the current study was the choice of the qualitative single case study design. I focused on one organization and interviewed leaders from different departments. Findings were limited to the strategies from one apparel company. The participants provided content based on the culture and philosophy of the organization. The strategies and experience may differ in other organizations. Another limitation was if the answers to the questions provided by participants were untrue or if the participants withheld valuable information. A limitation to the study can occur if the participants choose not to provide all of the information (Connelly, 2012). Limitations can also occur if there is a limited number of participants. Lastly, limitations can stem from time constraints for the interview due to the travel that is required to conduct the interviews; conducting a face-to-face interview requires travel and time.

The selected research instrument can also be a limitation. Not observing participants, not reviewing artifact records, and not conducting direct observation can

limit the researcher's ability to provide a holistic view of the case. The participants can be observed while performing their daily work activities (Castellan, 2010).

### **Delimitations**

Delimitations are the boundaries put in place by the researcher (Biczkowski, Müller-Frączek, Muszyńska, Pietrzak, & Wilk, 2014). The delimitations of the current study included the boundaries of conducting research in one state. Selecting one location for the study would provide content that is applicable to that region versus another region. I selected North America based on its reputation in the fashion industry. A single case study requires participants from one organization versus a multiple case study, which includes several organizations.

### **Significance of the Study**

The purpose of the study was to identify effective outsourcing strategies that leaders in the apparel industry use and how to overcome cultural barriers. Organizations may implement the findings to promote effective business practices. The findings of the study may increase the level of production and eliminate or reduce errors associated with outsourcing.

### **Contribution to Business Practice**

This study could be important for managers in apparel companies who are seeking to outsource and improve their current strategies. The findings of the study may offer additional insight into a business practice that continues to evolve. Organizations may benefit from identifying resources such as manufacturing providers and innovation of rapidly changing ideas.

### **Implications for Social Change**

The implications for social change include helping underdeveloped communities improve inhabitants' living conditions. Communities may benefit from job opportunities as apparel companies look to form business relationships in areas that present manufacturing opportunities. Improving the living conditions of communities may increase life expectancy. There may be an opportunity for families to increase their daily consumption of healthy meals. Children may have the opportunity to go to school. The literacy rate may increase and provide a better future for the community.

### **A Review of the Professional and Academic Literature**

The purpose of this qualitative single case study was to explore the strategies used by leaders in the apparel industry to overcome cultural barriers when outsourcing internationally. The literature review encompasses an overview of the theory of constraints and the evolution of this theory. The purpose of the study was to identify strategies to overcome cultural barriers and to identify efficient outsourcing activities. In the following literature review, I provide a holistic exploration of the supporting theories that added value to the research and other theories that were considered. The 150 references addressed in this study included 140 scholarly peer-reviewed articles representing 90.4% of the total three non-peer-reviewed articles representing 1.9%, five government websites representing 3.2%, and seven books representing 4.5%. There were 130 references that were published within the past 5 years, which was 86.7% of the total. The literature review contains 75 sources, including 70 published within the past 5 years, representing 93.3%, and 70 scholarly peer-reviewed sources, representing 93.3%.

The databases I used to find scholarly articles were Business Source Complete, Emerald Management, and Google Scholar. The search words used for the study were *outsourcing*; *offshoring services*; *outsourcing in the apparel industry*; *outsourcing in Latin America, Europe, Mexico, India, China, and Japan*; *outsourcing activities*; *regulations*; *laws*; and *history*.

### **Theory of Constraints**

Organizations often encounter setbacks that hinder their potential for expansion. TOC is used by organizational leaders to identify the internal functions of the organization that experience challenges; this can be expanded to include external sources, products, and services (Cannon, Cannon, & Low, 2013). TOC was introduced by Goldratt (1990) to increase productivity and improve the quality of work in an organization. Organizations must examine their current processes and follow leaders' instincts when making important decisions (Goldratt, 1990). The initial conversation that led to TOC began when management and Goldratt discussed their operations and determined where the pain points occurred (Goldratt, 1990). Organizational leaders developed TOC over time and have since implemented the concept in their organizational process (Cannon et al., 2013). TOC is adaptable to all industries, and the concept is universal because identifying constraints in everyday processes is common practice. Organizations domestically and internationally have adapted this concept. Industries that have benefited from TOC are health care, education, manufacturing, and automotive (Cannon et al., 2013).

An organization can take several steps to determine where constraints are occurring. Once the constraints are identified, the process includes determining what the constraint is, analyzing it, determining the priority level of the constraint, and repeating the process as necessary (Nave, 2002). Organizations must be aware of the components that keep the processes together. According to Dettmer (1997), different levels of constraints, both weak or strong, will have an impact on the organization. The significant components of TOC are useful to organizational leaders and workers who try to balance work and personal life by identifying constraints and taking action to rectify them (Dettmer, 1997). Organizational leaders who want to use TOC in internal investigation must identify what must change and how to implement the change (Rahman, 1998).

Organizational leaders have objectives when running a successful establishment. The focus can vary depending on the size or industry. However, there is a common goal shared by all organizations: higher level executives focus on the primary goal of increasing revenue, reducing cost, and returning profit (Gupta, Sahi, & Chahal, 2013). In addition, executives will seek out any constraints that hinder these primary goals (Gupta et al., 2013). Identifying the constraints early on can result in less negative financial. It is imperative to identify what triggers the unexpected occurrences and to locate the root of the problem during this discovery process (Gupta et al., 2013). The constraints that are discovered early on can save an organization time and money.

Goldratt's concept of TOC has evolved to include aspects of an organization such as improving projects, expanding marketing, and increasing profitability (Banerjee & Mukhopadhyay, 2016). Organizations utilize TOC because the results are rewarding and



they benefit in multiple ways. Incorporating the theory in a business model in a variety of ways can increase the financial success rate (Banerjee & Mukhopadhyay, 2016).

Organizations may determine whether the theory is successful by applying key performance indicators that measure how well the organizations are meeting their financial goals (Zivaljevic, 2015). Two areas which management can measure are the cost of operations and the company's inventory (Zivaljevic, 2015).

Companies looking to apply the TOC must have an end result in mind that leads to the ultimate goal (Zivaljevic, 2015). Having a goal will save an organization time and money. TOC has provided management with strategies that help them identify the constraints, research the cause of the constraints, and implement a solution that will lead to the organizational goal (Librelato, Lacerda, Rodrigues, & Veit, 2014). TOC has provided a multi-use capability for organizations' long-term success, which is important in a global business market (Librelato et al., 2014).

There are preliminary steps that organizations must consider before experiencing results of TOC. Organizations looking to achieve success when implementing TOC must identify what they want to achieve and the goals they want to incorporate into their business models (Pretorius, 2014). Brainstorming goals ahead of time allows organizations to make these goals more attainable (Pretorius, 2014). TOC creates value for organizations and also reduces cost (Naor, Bernardes, & Calado, 2013). Creating value is part of the initial discussion and goal setting for any organization looking to implement this theory. TOC can provide companies a deeper understanding of challenges faced during a difficult time (Naor et al., 2013). TOC also provides organizations the

opportunity to discuss current processes and determine their effectiveness based on the outcomes. Constraints can hinder a company from achieving goals if not identified early on (Gupta et al., 2015). The results of the TOC evaluation reveal an organization's constraints and help leaders determine how they can be resolved (Gupta, Bridgman, & Sahi, 2015).

TOC is applicable if effectively used by organizations, implementing steps into their daily operational functions. Pretorius (2014) examined Goldratt's step-by-step process to make it easier for organizations to find, use, and prioritize the resolution of constraints, as well as examine internal processes and repeat these steps if necessary. TOC shows management how to incorporate strategic procedures that give successful results (Chou, Lu, & Tang, 2012).

The concept of TOC gives management a set of tools that aid in identifying ongoing or recurring problems (Chou et al., 2012). To have successful results, management must ask important questions. Chou et al. (2012) shared three of Goldratt's questions that managers can ask, including (a) what should be done differently, (b) what the organization wants out of this, and (c) how management can incorporate this change. Answering these questions starts the conversation to begin the process of TOC. Fully understanding the constraints from beginning to end and using all resources to resolve them may provide a holistic solution (Wang, Sun, Si, & Yang, 2009).

TOC is important to managers seeking effective tools to improve internal functions. When managers identify recurring problems, it allows them to implement strategies that will eliminate current issues and focus on future growth and positive

outcomes (Wu, Huang, & Jen, 2012). Future growth is imperative to organizations looking to expand and seek new opportunities. The constraints of an organization and its finances are closely intertwined and affect one another (Gupta et al., 2015). The constraints that hinder an organization's growth opportunities can result in a loss in sales, which can decrease potential revenue and gross margin. According to Chou et al. (2015), the future goals of an organization start with identifying the core problems that exist. Identifying the underlying problems may not occur overnight; however, it is beneficial to begin that process. TOC is effective when management applies the concept to all areas of the organization. Taking immediate action can increase the chances of overcoming the obstacles that hinder an organization from reaching their goals (Librelato et al., 2014).

### **Lean Thinking Theory**

In contrast to TOC, the concept of lean thinking focuses on customer value and eliminating the waste that is involved in manufacturing processes (Lucato, Calarge, Junior, & Calado, 2014). The Toyota Production System incorporated the idea of eliminating waste based on the work of Deming (Jadhav, Mantha, & Rane, 2014). The concept of eliminating waste allows management to identify and remove unnecessary tasks and resources in production and manufacturing. Implementing one solution that solves all production problems has become a challenge for organizations (Carmignani & Zammori, 2014). Organizations can apply lean thinking in a variety of ways; there is more than one way to utilize the concept (Carmignani & Zammori, 2014). Organizations looking to succeed in a competitive market may find it useful to generate unique ideas and apply theories that fit with the current manufacturing and production market.

Organizations looking to implement lean thinking must include employees in the discussion and implementation stage because they play an important role in the strategic planning and execution (Pakdil & Leonard, 2014). Lean thinking has a trickle-down effect that starts with upper management (Pakdil & Leonard, 2014). Involving all employees or those who have a stake in the company can increase the likelihood of success. The success rate of lean thinking increases when the organizational culture is open to new ideas and concepts (Pakdil & Leonard, 2014). Without this open-mindedness, there will be challenges that arise from employees who cannot adapt easily. Organizations can include training, tools, and resources to supplement implementation of lean thinking.

Organizations in different countries have attempted to apply lean thinking practices; however, outside of Japan, where the concept was widely used, the success rate of utilizing and implementing lean manufacturing is 10% (Jadhav et al., 2014). The success of lean manufacturing depends on an organizational willingness to embrace the concept. Organizations in India tried to implement lean thinking practices but experienced challenges in implementation (Jadhav et al., 2014). Successfully implementing lean manufacturing requires research and an in-depth understanding of the concept by organizational leaders and employees. The growing demand for companies to change and improve production processes has also led to organizations looking to apply the concept of lean thinking globally (Bhamu & Sangwan, 2014).

Organizations that have success with lean manufacturing can reduce expenses and increase production (Bhamu & Sangwan, 2014). In addition to improving the quality of

products, industries such as health care can apply lean production concepts to engage employees and plan for successful long-term strategies by focusing on the important tasks of the job and eliminating unnecessary duties (Simons, Benders, Bergs, Marneffe, & Vandijck, 2016). The lean concept can be applied to various industries; however, the industry most frequently utilizing lean manufacturing is automotive (Simons et al., 2016). Finding ways to incorporate the concept into a company's business model is possible, but it does take time and research.

The textile industry, which encompasses small to medium enterprises, has implemented lean thinking. Industry leaders considering this approach must determine whether or not it will be beneficial and increase value (Manfredsson, 2016). Industry leaders in the textile industry have identified how this concept creates value for their customers, how it can be measured, how to create an effective model to explain lean thinking, how they can identify the results, and how they can implement a streamlined system that will reduce imperfections (Manfredsson, 2016). Industry leaders in luxury fashion brands are seeking alternative methods to include in their strategic processes. The goal is not to find the perfect solution; the goal is to find ways to incorporate new ideas into the current business model (Carmignani & Zammori, 2015). Luxury fashion brands continue to evolve; however, the global economy has changed over time, and implementing new concepts is imperative when looking to save on operational cost (Carmignani & Zammori, 2015).

Lean thinking theory is also used in education, health care, and information technology (Narayanamurthy, Gurumurthy, & Chockalingam, 2017). Lean thinking has

been used in different industries to develop an effective strategy to reduce waste, increase productivity of workers, and deliver results (Narayanamurthy et al., 2017). Organizations are looking to implement a model that is useful internally and externally. The goal of this concept is to provide solutions that are beneficial to all consumers (Douglas, Antony, & Douglas, 2014). Moreover, organizations value lean thinking because of the importance it places on customers and improving internal processes.

The principles behind this theory include deciding what is important to the customer: (a) what are the strategic processes that are effective and not effective, (b) when should a process be streamlined, and (c) how should the process be restructured to reduce time and create value (Douglas et al., 2015). Evaluating the process flow of an organization is imperative to increase value and provide exceptional service to customers. For lean thinking to be implemented into the current processes of an organization, Rees (2014) recommended that management receive the proper training. Tsasis and Barrett (2008) emphasized the importance of employee engagement, which includes open discussions about the concept. Open dialogue between management and staff increases awareness of lean thinking and improves the implementation of the theory into daily activities.

### **Outsourcing History**

Outsourcing is a valued business strategy implemented by various organizations throughout the world (Lonsdale & Cox, 2000). The concept has provided a plethora of opportunities that date back to the initial implementation stage, such as production of goods and services for a reduced cost. During the 1980s, industry leaders developed

concepts related to outsourcing to evaluate and determine which components were important and would have more success (Lonsdale & Cox, 2000). According to Lonsdale and Cox (2000), Peters is considered one of the early thought leaders around outsourcing and provided direction to his management team. One strategy Peters suggested is that organizations focus on the core business (Quinn & Hilmer, 1994); by doing so, organizations will be able to outsource components outside of the main business function. This concept impacted the way organizations operated in the 1980s (Quinn & Hilmer, 1994). Outsourcing to third-party contractors increased the production of goods and allowed companies to remain competitive in a global market (Lonsdale & Cox, 2000). Vertical integration began to evolve during the 1980s as organizations began to expand and offer more value to their customers (Lonsdale & Cox, 2000). Furthermore, organizations applied this business strategy to maximize their external resources and produce goods at an affordable cost (Quinn & Hilmer, 1994).

### **Contemporary Outsourcing**

The needs of organizations have changed during the years from 1980 to 2018, and outsourcing has evolved; the primary needs of production and assembly were expanded to include secondary needs such as distribution, design, and after-sales service (Liao & Radhakrishnan, 2013). Leaders outsourcing in the 2018 business environment have requested additional tasks from the vendors for the same cost. Vendors are becoming sophisticated in their use of technology to produce high-quality merchandise and services. Organizations looking to maximize the benefits of outsourcing and the use of vendors see outsourcing as an opportunity to expand negotiation terms (Liao & Radhakrishnan, 2013).

There has been a shift in the relationship between vendor and organization since the 1980s. A partnership evolved between organizations looking to outsource and manufacturers (Mathrani & Mathrani, 2016). Thanks to outsourcing, developed economies have established a relationship with emerging economies as the emerging economies provide highly technical and qualified talent (Mathrani & Mathrani, 2016).

### **Outsourcing Risks**

Organizations must be aware of the risks associated with outsourcing before implementing this business strategy (Zuh & Pickles, 2014). Outsourcing focuses on the production needs of a business and works with an outside manufacturer to produce goods or services. Managing these functions is essential. One of the potential risks when outsourcing is a decrease in quality of the work or service that is produced. If production is not monitored properly by the organization, low quality of work can result in loss of revenue for the organization and loss of business for the vendor (Zhu & Pickles, 2014). Another risk is that the organization may become overly dependent on the third-party vendor and lose control of all aspects of the relationship and production of goods (Vaxevanou & Konstantopoulos, 2015). Moreover, there is a shared risk among all parties involved in outsourcing (Doval, 2016).

### **Outsourcing Advantages**

Outsourcing can provide a plethora of advantages to organizations. External vendors have the tools and equipment to support large client requests and to produce large quantities of goods (Vaxevanou & Konstantopoulos, 2015). By focusing on the core competency, an organization can become better positioned against the competition



(Vaxevanou & Konstantopoulos, 2015). Additional key advantages to outsourcing are the reduced need to hire additional staff and provide training (Doval, 2016). Organizations save on cost when the external vendor provides skilled workers to perform the job requirements (Doval, 2016). An organization can select when services or goods are needed, which gives them greater control and is a cost advantage to the organization, so they do not overproduce and remain within budget.

### **Outsourcing Products**

Organizations looking to outsource must first determine which products can most efficiently be produced in-house, and which are best produced externally in order to reduce cost of production. From the 1980s to 2018, business leaders began to expand outsourcing globally. Due to the availability of highly skilled workers and advanced technology, outsourcing began to increase (Wu, Li, Chu, & Sculli, 2013). The products outsourced have evolved during the past two decades, and diversity was evident in apparel manufacturing, automotive, technology products, etc. (Wu et al., 2013). Selecting the right manufacturer to produce a product is crucial and greatly impacts the successful production of goods. There are risks to the outsourcing products, however, organizations must weigh the risk of disclosing in-house product knowledge to an outside source such as the external manufacturer (Wu et al., 2013).

Producing goods in the apparel industry requires identifying the specific needs of the manufacturer. Outsourcing production needs can include raw materials, fabric, and finished garments (Caniato, Crippa, Pero, Sianesi, and Spina, 2015). The scale of the production must also be determined. Manufacturers may produce products in small

quantities, such as products aimed at a higher end consumer, or in large quantities to reduce unit costs. Production orders may also be a combination of two (Caniato et al., 2015). It is important for the outsourcing company to identify the manufacturer's fundamental needs when outsourcing.

### **Outsourcing Services**

Outsourcing service activities has become common international business practice (Pisani & Ricart, 2016). The service industry has evolved since the early 2000s, and the services outsourced by organizations looking to remain competitive have expanded. These service areas range from information technology such as software development, to customer service, to areas in the medical field (Pisani & Ricart, 2016). Pisani and Ricart (2016) determined that there was an increase in literature published regarding offshore services for different geographic regions. This growing interest is an indication of more service needs. In 2016, outsourcing to different regions increased from the previous five years: Asia by 39%, South America by 4%, eastern Europe by 2% and western Europe by 2% Pisani and Ricart (2016) highlighted the growing phenomenon of IT services, which are often outsourced to countries such as India and represent 65% of all offshore outsourcing by U.S. companies. Per a study conducted by Dluhosch and Thorsten (2016), offshoring intangible services has increased in the United States since the early 2000s; there has been a concomitant increase internationally in highly-skilled workers looking to fill jobs such as IT customer service.

### **The Concept of Nearshoring**

Organizations looking to produce products or services outside of their establishment have multiple options. One strategic option is nearshoring. Nearshoring is when companies outsource to organizations in nearby countries (Slepniov et al., 2013). Nearshoring benefits companies and provides more than one alternative for goods production. Organizations that implement nearshoring can more easily mitigate risks due to proximity and reduced expenses (Slepniov et al., 2013). Nearshoring has become a consideration for companies looking to save on the cost of labor and fuel and be able to more quickly access the location (Ellram et al., 2013).

### **Economies of Scale Through Outsourcing**

Outsourcing benefits organizations looking to implement the concept of economies of scale. An example of this is a contemporary apparel company that needed to offer multiple products in various quantities, sizes, and colors because consumers in the 2016 global market were looking for variety when shopping for goods (Xiao, Choi, & Cheng 2015). Providing a plethora of products and services can positively impact a company's consumer growth, longevity, brand awareness, and revenue (Xiao et al., 2015). Per Sumita and Yoshii (2013), economies of scale are often employed in growing economies where consumers are looking for more variety and less expensive products. Production meets these demands by increasing the volume of goods produced. Established economies can implement the concept of 70-30, which states that 70% of goods and services can appeal to exactly what the consumers' needs are, and 30% can be customized (Sumita & Yoshii, 2013).

## **Outsourcing Regulations**

Outsourcing regulations are a major concern for companies consigning services or products to an outside source. Rules and regulations are enforced by governments on corporations to ensure a proper code of conduct is implemented and followed accordingly, and regulations continue to expand and evolve (Haufler, 2013). Manufacturing regulations important to employees and employers include employee rights, working conditions, and wages (Zhu & Pickles, 2014). Outsourcing regulations include trading policies and regulations set by entities such as the World Trade Organization (Zhu & Pickles, 2014). Successful strategies can be identified by examining outsourcing regulations such as in China, which provides the largest apparel outsourcing distribution in the world and employs over 4.9 million workers (Zhu & Pickles, 2014).

## **Tax Incentives**

Tax incentives are defined as a section of the overall tax code that enables countries to compete on a broader scale by drawing foreign companies into their emerging markets (Brodzka, 2013). Organizations looking to outsource products or services are seeking benefits. Offering tax incentives to these organizations has become a strategy used by countries to entice U.S. companies abroad (Schieberl & Nickles, 2014). Emerging economies in various regions such as Latin America, Asia, and Africa are luring organizations by offering tax incentives that provide a number of benefits to compensate for a relative lack of infrastructure (Brodzka, 2013). Tax benefits offered as incentives include tax holidays, which suspend paying taxes for new entities in emerging

markets for a certain period, and tax allowances and credits, including write-offs and other tax reductions (Brodzka, 2013).

### **Outsourcing Laws**

Outsourcing laws are necessary when conducting business internationally (Zhu & Pickles, 2014). They provide structure for organizations so that business is conducted fairly. Organizations must become informed of the outsourcing laws of the country in which they plan to conduct business as there may be laws specific to that country and its business environment. Developing countries may have laws that differ from developed nations (Zhu & Pickles, 2014). Implementing favorable laws for outsourcing is a primary strategy used to attract external organizations to certain countries (Zhu & Pickles, 2014). Outsourcing laws may be designed to protect the citizens of that country as well as increase business activity. Organizations in developing countries that offer outsourcing services are often challenged regarding the working conditions of the employees and whether they are being treated fairly (Pisani & Ricart, 2016). The treatment of employees in overseas factories became a matter of concern in the 1990s, when poor working conditions and use of underage workers were brought to the attention of the public (Pisani & Ricart, 2016).

### **Language Barriers**

Outsourcing internationally, if done correctly, requires effective communication among the parties involved in the process (Yang, Yuan, & Liu, 2014). Organizations must find ways to communicate efficiently (Yang et al., 2014). Language barriers can critically impact the exchange of services when outsourcing demands are unintentionally

miscommunicated (Meuter, Gallois, Segalowitz, Ryder, & Hocking, 2015). This can result in a loss of revenue if information is misinterpreted. Corporations working with multiple parties on a global scale can present scenarios of communication in different languages as reference to manufacturers, however, there must first be mutual understanding and trust in order for this to work (Yasin & Yasin, 2013). Organizations can equip themselves with strategic plans to identify the communication barriers before engagement (Yasin & Yasin, 2013). Yasin and Yasin (2013) demonstrated the benefits of this type of preparation, which involved implementing a communication tool to promote effective communications and collaboration among business partners.

### **Currency Exchange**

Organizations outsourcing internationally will engage in the currency exchange process (Auboin & Ruta, 2013). Understanding currency exchange rates and how they fluctuate is imperative in international business transactions (Auboin & Ruta, 2013). Leaders managing of currency operations may have difficulty if they are not aware of the different rates and how rates apply to business dealings (Auboin & Ruta, 2013). Historically, exchange rates and trade policies have been closely connected; countries devalued rates in order to gain economic advantage over the competition (Broz & Werfel, 2014). Implementing different tools to measure exchange rates therefore became the standard for some companies (Broz & Werfel, 2014). The real effective exchange rate was developed to aid in the pricing accuracy of trading partners on a global scale (Broz & Werfel, 2014). Organizations should be aware of the possible discrepancies in currency exchange practices and devise methods to overcome these challenges.

## **Different Cultures**

Outsourcing on a global scale presents the opportunity to engage with clients from different cultural backgrounds (Wedding, Oliveira, & Macada, 2013). Differences in culture can impact the success of the business relationship either negatively or positively (Wedding et al., 2013). Cultures conduct business in different ways and misinterpretation can impact the opportunity to cross-sell knowledge (Wedding et al., 2013). Wedding et al. (2013) demonstrated the importance of sharing knowledge and identifying barriers to that shared knowledge prior to conducting business. Different cultures may present conventional or unconventional environments (Sharma, Lindsay, & Everton, 2014). Developing countries from which organizations are looking to outsource may engage in business in an informal manner (Sharma et al., 2014). Organizations must conduct research and study the differences of culture before the engagement process begins (Sharma et al., 2014).

## **Operations Strategy**

Outsourcing operations has developed over the course of time as organizations incorporate successful operational strategies (Caniato et al., 2015). The fundamental concept of operational strategies is to incorporate unique capabilities that enable organizations to remain competitive, maximize resources, and reduce expenses associated with this process (Caniato et al., 2015). As organizations penetrate new markets on a global scale, they need to expand their ability to perform tasks, assess resources required, and implement successful processes (Gong, 2015). Organizations outsourcing services to developing countries should pay close attention to their operations, which require more

development due to lack of efficient and effective processes (Rehme, Nordigarden, Brege, & Chicksand, 2013).

### **Best Practices**

The best practices of outsourcing include conducting research prior to beginning the process (Caniato et al., 2015). Having knowledge of how to implement outsourcing into an existing or new business is key. Organizations that research the outsourcing industry will have an advantage over those that do not. Determining the location of the outsourced manufacturer is also very important (Caniato et al., 2015). Proximity can be an important decision to make for an organization, including the location of the corporate office and the outsourcing location (Caniato et al., 2015). The outsourcer may want accessibility to the country it plans to outsource in, in order to have ease of travel and to save on shipping and logistics costs (Rehme et al., 2013). The distance to the location can be significant if the organization decides to send an overseer to evaluate the process and the conditions at the manufacturer (Caniato et al., 2015). Evaluating the conditions of the location and facility is important before beginning a business relationship. An additional best practice is to ensure effective communication between all parties involved through taking into consideration the language spoken, and the time zones. Knowledge of a common language is important for both parties to communicate needs and wants (Rehme et al., 2013). The communication process includes email, fax, purchase orders, contracts, etc., which need to be agreed upon by both parties (Rehme et al., 2013). Miscommunication of important documents and orders can be costly and cause major production delays.



## **Transportation and Logistics**

Transportation and logistics are important elements when outsourcing internationally. There are several transportation options when outsourcing overseas, such as ocean freight and air freight. Organizations must determine which transportation resources are more beneficial to their needs. Determining the right transportation method can save time and money for the outsourcer. Additionally, organizations must take into consideration the freight charges when shipping cargo. Transportation and logistics cost can vary depending on the distance the products are shipped, the shipping method, whether an agent is used, and if the products are shipped directly or on a multi-stop route. The logistics of the outsourcing process include managing production, the facility, and the necessary resources (Slepnirov et al., 2013).

## **International Outsourcing**

International outsourcing provides a plethora of benefits for organizations looking to enhance productivity and reduce expenses associated with outsourcing (Sharma et al., 2014). International outsourcing is also an opportunity for companies to better compete in a global market (Sharma et al., 2014). Different countries are sought out for various outsourcing purposes, such as manufacturing and services (Sharma et al., 2014). There is a growing interest in countries such as Brazil (Parmer, 2016). Latin America in general has seen an increase in outsourcing services and production from clients from 2012 to 2016, and an increase in manufacturing production companies from 16,200 to 44,900 (Parmer, 2016). These services range from customer service to manufacturing of goods (Parmer, 2016).

International outsourcing must be reviewed and implemented in stages (Choi & Beladi, 2014). To experience benefits such as reduced production cost, organizations must determine the steps needed to assess all components before the implementation stage (Choi & Beladi, 2014). The assessment stage encompasses breaking down each area of the organization that will utilize outsourcing and determining the necessary steps to make the process efficient and effective. International outsourcing also magnifies the skill set of smaller countries offering this service and gives larger countries the ability to make decisions that meet their needs (Choi, 2016). Smaller countries can expand their outsourcing services such as increasing the variety of goods produced or services provided (Choi, 2016). Increasing the outsourcing services allows smaller countries to enhance their chances of becoming the premier choice for larger countries that need this service.

**China.** China has increased its dominance throughout the years and has established itself as a global leader in manufacturing as well as exporting (Paul & Mas, 2016). China has become one of the most sought out markets for manufacturing goods. The economy has grown and accelerated in terms of exporting because companies are using their outsourcing services. The success of outsourcing has resulted in the country becoming the second largest economy in the world (Paul & Mas, 2016). China has implemented a system that incorporates a combination of inexpensive labor cost and limited involvement from the government that is attractive to external organizations (Paul & Mas, 2016). The products manufactured in China include textiles, appliances,

computers, phones, etc. The Chinese government has implemented tax benefits to manufacturing in China in order to appeal to domestic organizations (Zhen, 2014).

Further research has demonstrated the importance of partnership among all parties involved in the outsourcing relationship (Chang & Chen, 2016). Collaboration between the manufacturer and the outsourcer ensures that everyone is in accord. Collaboration can reduce the amount of confusion and inaccuracy when producing goods, and increase the level of communication. Chang and Chen (2016) further explained the growing pains that occur during the initial phase of an outsourcing relationship. The lack of comprehension of a contract can result in many challenges (Chang & Chen, 2016). Successful managers have stated they must spend an excessive amount of time explaining the contracts with the outsourcing partner. Implementing new departments may be a solution to overcoming internal challenges when outsourcing (Chang & Chen, 2016). Building relationships with the country one is outsourcing depends on the culture and beliefs; for example, China values personal relationships (Huo, Liu, Kang, & Zhao, 2015).

**Japan.** Outsourcing to Japan decreased during the early 2000s; however, during its prime, it provided great benefits and strategies for organizations to learn from (Tomiura, Ito, & Wakasugi, 2013). The benefits of outsourcing can vary depending on the needs of the company looking to outsource, ranging from geographic location, superior skills, and knowledge of goods (Tomiura et al., 2013). An area of discussion when implementing outsourcing is the language barrier. Communication is imperative between the parties involved (Tomiura et al., 2013). Organizations must ensure that their employees have the skills necessary to communicate with an outsourced manufacturer

(Tomiura et al., 2013). Japan has understood these challenges and addressed them accordingly (Tomiura et al., 2013), and adopted the use of outsourcing to gain a technological advantage over its international competitors such as the United States (Ma, Ding, & Hongyu, 2016). Gaining a competitive advantage is an important factor for organizations considering outsourcing.

**India.** Outsourcing to India began in the early 1980s, and India has become a highly sought out country for outsourcing. The country has exported a diverse group of products and services that range from apparel to IT customer service (Rajshekhar, Joseph, Granont, & Gross, 2013). The country employs skilled workers, which has increased preference for India as an outsourcing partner. The country has developed a strategic plan that educates its students to become experts in sought out labor skills in areas such as math, science, and technology (Rajshekhar et al., 2013). Preparing the workforce to become skilled in outsourcing activities has increased opportunities to outsource to India. India has become increasingly aware of its advantage over other nations (Rajshekhar et al., 2013). India has taken the opportunity to invite potential outsourcing partners and providing tours of the country's infrastructure (Kesavan, Mascarenhas, & Bernacchi, 2013). These tours allow organizations to see firsthand the advancement of the country, including its well-prepared workforce and technology development (Kesavan et al., 2013).

Per a study by Kesavan et al. (2013), India has become a premier choice for outsourcing for several reasons, such as the number of English speaking workers and the turnaround times for completed services. Organizational leaders understand the importance of communication and the effects of language barriers and the turnaround

time is imperative when meeting deadlines for production. A competitive advantage for India is its increasing population rate during 2006 to 2016 (Paul & Mas, 2016). As in China, the increasing population growth in India plays a major role in the amount of skilled labor available, which can help India and China acquire a large portion of the world's outsourcing activities (Prabhakar & Saran, 2015).

**Brazil.** Brazil has joined the growing number of countries that have taken part in outsourcing due to its ability to produce goods and keep up with growing demands (Lema, Quadros, & Schmitz, 2015). Aside from the benefit of accelerated production of goods, companies looking to outsource benefit from low employee wages. Lema et al. (2015) noted the attraction of hiring highly skilled workers with advanced degrees in fields such as science, engineering, and math for lower wages. Employees were sought out for the benefits of producing quality work. According to Fernandez and Valencia (2013), Brazil has become a prime location for outsourcing due to the ability to make changes relating to labor, which attracts many organizations because of flexibility. Outsourcing to Brazil continues to expand due to its ability to adjust and apply new reforms in response to the current business environment (Guimaraes, Bastos, Vasconcelos, & Andalecio, 2015). As a hosting country to outsourcing services, Brazil has made it attractive with the flexibility of its offerings while providing quality services.

**Mexico.** Mexico experienced an increase in outsourcing opportunities in 1994 as a result of the North American Free Trade Agreement, which lured organizations to take advantage of low-cost services and manufacturing (Arroyo & Ramos, 2015). One benefit of outsourcing to Mexico was the proximity of the region to the United States compared

to Asia and Europe (Arroyo & Ramos, 2015). Organizations looking to outsource to different regions may consider the actual distance, in addition to the culture, and administration of the parties involved (Slepnirov et al., 2013). The travel time to Mexico is shorter, and the ability to communicate in Spanish is more widespread in the United States due to Spanish being the second most common language (Slepnirov et al., 2013). Companies in Spain would consider outsourcing to Mexico due to language and cultural commonalities (Slepnirov et al., 2013). Organizations in the United States continue to outsource to Mexico primarily because of the geographic distance (Slepnirov et al., 2013).

**Eastern Europe.** Eastern and central Europe saw an increase in outsourcing activity in the mid-2000s, as global trade continued to expand beyond geographic limits (Gal, 2014). The increase in outsourcing activity in this region is due to a variety of economic reasons. As China and India have become dominant players in outsourcing, they may pose a challenge to Bulgaria. An advantage Bulgaria has over its competition is the ability to provide nearshoring services to its neighboring countries (Gal, 2014), as providing outsourcing services to countries that are geographically closer can be an advantage. The increased popularity of nearshoring can make the engagement process more manageable (Budzynska, 2016).

**Western Europe.** Outsourcing continues to evolve in western Europe as the competition grows in the region. The United Kingdom has seen an increase in activities as one of the largest consumers of exported goods (Oshri & Ravishankar, 2014). Providing services and products that are of high quality by knowledgeable, skilled workers has become the strategic offering of the United Kingdom (Oshri & Ravishankar,

2014). An abundance of companies looking to outsource are interested in quality products to offer to customers. As the competition continues to increase in the global market, organizations are competing to offer quality products and services (Mitchell, 2015).

### **Foreign Direct Investment**

Foreign Direct Investment (FDI) increases business engagement between external enterprises and recipient countries (Davaakhuu, Sharma, & Bandara, 2014). Entities involved in FDI seek out opportunities in countries outside their own, which has a plethora of advantages, including the ability to expand the existing product offering, reduce production cost, and gain a competitive advantage in the market (Davaakuu et al., 2014). The hosting country gains through expansion of technology, employment opportunities, and opportunities to bring in additional FDI. In addition, emerging countries can grow their economy, which results in more opportunities for the citizens (Ravinthirakumaran, Selvanathan, Selvanathan, & Singh, 2015). To partake in FDI, developing countries must evaluate the current policies and procedures that exist. If the assessment of policies is not rewarding for the investor there will be a decline of interest, which can reduce the chances of building their economy (Ravinthirakumaran et al., 2015). FDI is a promising opportunity to bring manufacturing opportunities to the Caribbean, as emerging economies can offer production services to the apparel industry for a reduced cost. Investors benefit from the location and the accessibility to oversee the entire process.

## **Transition**

In the apparel and textile industry, outsourcing practices continue to evolve and more organizations are participating in and implementing this business strategy (Pratap, 2014). Global competition has forced organizations to consider their internal processes and determine which areas of production or service should be outsourced (Pratap, 2014). The strategy behind outsourcing is to save on cost, provide flexibility, and focus on the core aspects of the business (Rathje, Deflorin, & Anand, 2014). Organizations are looking to provide variety in product offerings and the ability to meet customers' demands (Rathje et al., 2014).

Global competition has opened doors for developing countries to take part in this business strategy. However, countries such as China and India have dominated due to their ability to provide products and services at a low cost. There are cultural challenges that countries such as China and India had to overcome in order to succeed in this area (Paul & Mas, 2016). Organizations can overcome these challenges through utilizing TOC to determine internal constraints and strategies for overcoming them (Goldratt, 1990).

Researchers use case studies to explore a research topic (Yin, 2014). The challenges faced in outsourcing relationships encompass differences in language, currency exchange, rules and regulations, and taxes. Section 2 will focus on the participants, research method, research design, population sampling, ethical research, data collection, data organization, data analysis, study validity, reliability, and validity. Section 3 will focus on presentation of findings, application to professional practice,



implications for social change, recommendations for actions, recommendations for further research, reflections, and conclusion.

## Section 2: The Project

The objective of this single case study was to identify and provide a deeper understanding of successful outsourcing strategies that enable an organization to overcome cultural barriers when implementing this business practice. The study included interviews conducted on site with managers who have overcome outsourcing challenges. In addition to conducting interviews, I reviewed company materials for important content, such as the company policy handbook, training materials, and other resources used by the organization. Section 2 provides the purpose statement, role of the researcher, participants, research method and design, population and sampling, ethical research, data collection instruments, data collection techniques, data organization technique, data analysis, and reliability and validity.

### **Purpose Statement**

The purpose of this qualitative single case study was to explore the strategies used by leaders in the apparel industry to overcome cultural barriers when outsourcing internationally. The population for the study was leaders in a North American apparel company who outsource internationally and have implemented outsourcing strategies. The leaders within the organization are decision-makers in communication with external manufacturing companies. Their roles are supervisors, production managers, production coordinators, and technical designers. These individuals met the selection criteria of the study because they are the decision-makers within their departments.

### **Role of the Researcher**

As the primary instrument to collect data for this study, my role was to collect and analyze data obtained through semistructured interviews with experienced managers in the field. To mitigate possible bias during the interview process, I followed an interview protocol (see Appendix B). The data collection process required me to recruit qualified leaders who had experience in outsourcing and to conduct semistructured interviews to answer the research question (see Wedding et al., 2013). Data were collected by recording the interview and taking notes during the interview. The views and opinions were from the participants in the study. The material presented was gathered from the participants and based on their experience when addressing outsourcing. The interviews were conducted over the phone with organization leaders in North America. Many North American organizations use outsourcing strategies. I had no connection to the company selected to mitigate potential biases.

Adhering to the principles of ethics and incorporating this notion into my study was fundamental. My values were not compromised during the process of gathering and interpreting data. Furthermore, I followed *The Belmont Report* (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979) protocol that included (a) being transparent with participants and presenting data that are understandable, (b) protecting participants' identity and not causing harm, and (c) sharing benefits from the study fairly among all participants.

As an individual with a Caribbean background, I needed to ensure personal biases were mitigated. Bracketing strategies in the data collection and analysis process

consist of eliminating any assumptions related to the topic and findings based on personal knowledge or experiences (Chan, Fung, & Chien, 2013). The purpose for conducting the interviews was to identify successful strategies implemented by organizational leaders with years of experience. Data gathered from the interviews may provide insight for businesses wishing to outsource and incorporate proven outsourcing strategies into their practices.

### **Participants**

The participants included business leaders involved in the outsourcing implementation of an organization. The leaders ranged from upper management to supervisors who oversee the entire operation. The decision-makers provided direction to those who report to them. The management team had experience and proven success that impacted the organization positively (see Zeng & Muir, 2015). Management can decide which country to outsource to in order to get quality goods and save on cost. Leaders of the organization had considerable industry experience and could contribute to the study based on their experience. Organizational leaders involved in the process were experienced leaders who had led successful teams. In addition, management had the best interest of the organization in mind and shared the same objectives (see Nichols, 2016). Supervisors involved in the process were those who did the hands-on work and acted as team leaders. Managers and supervisors had direct contact with the organization they would outsource to as well as the opportunity to travel to the manufacturer's site to see firsthand how operations were handled.

The strategies used to gain access to the participants included calling, emailing, and onsite visits. The use of Skype calling was an alternative to onsite visits because of possible time constraints and location. To obtain access to the key decision makers, I identified industry leaders by researching trade publications and resources that pertain to the apparel and manufacturing industry. Calling potential participants was an opportunity to introduce myself and provide a brief overview of the study. The next step was to send emails that presented additional information. The preliminary steps were important because I identified the key decision-makers and determined whether they would be willing to participate in the study. Establishing a working relationship with participants included open communication and being available throughout the process. Relationship building with participants is an opportunity to establish trust needed for the research (Swauger, 2011). Providing different methods of contact, such as email and phone, is important for accessibility. Additionally, remaining professional always is important to build credibility.

### **Research Method and Design**

I interviewed leaders in management who had implemented successful outsourcing strategies. The interviews included open-ended questions that allowed me to explore the subject and gather the information for the qualitative single case study (see Barnhan, 2015). The decision-makers for these interviews had experienced all facets of outsourcing internationally. The industry leaders had knowledge that was useful to the study and provided different perspectives.

## **Research Method**

Researchers who conduct qualitative studies often focus on the *why* and *how* aspects of behaviors in order to generate an in-depth explanation of decisions made, based on open-ended questions (Barnham, 2015). Qualitative studies provide a robust exploration of a research topic (Barnham, 2015). Qualitative studies provide data from subject matter experts within their field of study, and readers can apply their findings (Bailey, 2014). The purpose of this qualitative study was to explore the strategies used by leaders in the apparel industry to overcome cultural barriers when outsourcing internationally. A qualitative approach was suitable for this study because it allowed for the exploration of outsourcing strategies used by experts in the industry (see Klenke, 2016). Hands-on expertise was valuable to this study because the data included strategies that are currently being used. The other research methods I considered were quantitative and mixed methods. Quantitative studies focus on numerical data and not the exploration of participants' experiences (Weston & Vullo, 2014). Collecting numerical data was not suitable for my study because numerical data would not have provided the in-depth experience and knowledge from the participants. The mixed-methods approach would have required a combination of qualitative and quantitative approaches. However, the purpose of my study did not require quantitative data.

## **Research Design**

The design that was suitable for this research was a single case study. The case study design provided an opportunity to interview leaders in the apparel company who had implemented successful outsourcing strategies and had overcome cultural barriers.

The research design selected for this study allowed me to gather information from experts in the apparel industry. Conducting a single case study allows a researcher to collect data from various methods such as onsite fieldwork, interviewing participants, and document review (Conklin, 2012). Gathering information provides direct insight on strategic outsourcing and a level of expertise from leaders that can only be gathered from experience (Dasgupta, 2015). Interviewing multiple participants for this study increased the probability of reaching data saturation. This was accomplished by engaging with multiple participants, which provided enough data to answer the research question (see Morse, 2015).

Three research designs were considered for this qualitative study: case study, phenomenological, and ethnographic. Neither phenomenological nor ethnographic designs were selected for this study. A phenomenological study focuses on lived experiences, and an ethnographic study focuses on cultural experiences (Conklin, 2012).

### **Population and Sampling**

The population selected for this study was leaders in the apparel industry in North America. The leaders were decision-makers who had taken charge in outsourcing efforts. The population consisted of senior leadership or business owners. The leaders selected for this study had implemented strategies when challenged with cultural differences that had resulted from outsourcing to another country. The type of day-to-day strategies consisted of: researching, product knowledge and development, traveling, and external communication with outsourcing manufacturers.

The single case study design was used to explore one company and the leaders of that organization. The interview questions addressed companies in the apparel industry and the strategies they use to outsource successfully. The sampling method used for this study was purposeful. Suri (2011) noted that purposeful sampling allows researchers to recruit individuals who can bring value to the study because of their expertise in the field. I used purposeful sampling because the study required individuals with experience and expertise in outsourcing in the apparel industry. The experience the leaders provided could be applied when outsourcing to the Caribbean.

Determining sample size is important because the goal of a study is to reach data saturation. Purposeful sampling and data saturation are closely connected. Sample size can vary for qualitative studies; however, reaching data saturation is the goal (Mason, 2010). Selecting individuals who will provide valuable insight on a study topic is dependent on the interview questions asked (Suri, 2011). According to Dworkin (2012), the number of participants in a study can range from five to 50, depending on when data saturation is achieved. However, it is not uncommon to reach data saturation with fewer than five participants. Qualitative studies do not require a large number of participants. As a result, the targeted number of participants for the current study was between 5 and 10 industry leaders. The final number of participants depended on when data saturation was achieved and when the research question was answered. The participants selected for this study included leaders in an organization. Their leadership roles included c-level executives, vice president, or business owners, all of whom had proven track records of implementing strategic strategies when outsourcing. The research question must be



precise so that the participants provide answers that give insight into the study and to increase the chances of reaching data saturation (Morse, 2015). The number of questions asked in the study is not as important as the type of questions asked (Morse, 2015). I continued to interview participants until data saturation was achieved. Reaching data saturation occurred when no new information was uncovered. I reviewed the interview answers to ensure no new themes were emerging.

### **Ethical Research**

Before conducting the research, I received approval from Walden University's Institutional Review Board (IRB) to ensure I met all ethical requirements. IRB approval provided confirmation that the study was designed to meet ethical requirements (see Wallace & Sheldon, 2014). The process included a consent form that was signed by each participant before the interview commenced. For a remote interview via Skype, the participant e-signed the consent form and returned it via email. I signed the form as well. All participants completed the consent form, which included the purpose of the study, a sample of the interview questions, and their permission to partake in the study.

The participants could have withdrawn from the study at any time without repercussions. All that was asked from the participants was to give notice to me via email, phone, or text. No participants withdrew from the study. Incentives for taking part in the study were a thank you gift or gift card as an appreciation for their time. The gift was mailed to the participants after the interview.

Protecting the identity of the participants and the organization used for the study was imperative because of the nature of information disclosed. I reviewed confidentiality

with the participant using the informed consent form. To protect their identity, I did not reveal the names of the participants and company. I stored the data in a file cabinet that will be locked for 5 years. Data will be in a secured area that no one other than me will have access to. After 5 years, the data will be discarded and destroyed to ensure protection of the participants and company used for the study. The IRB approval number was 12-17-18-0451174.

### **Data Collection Instruments**

I was the primary data collection instrument for this study. I incorporated member checking, which is one of the final steps in this process. Member checking is imperative so that the researcher reiterates the information to the participants of the study to ensure accuracy of information provided (Harvey, 2015). The method selected to gather information from the participants was interview questions. The interview questions are part of the process to collect data (Yin, 2014). For the current study, participants were asked 10 open-ended interview questions regarding strategies used by leaders in the apparel industry (see Appendix A). Triangulating data from different sources can increase the validation of the study (Yin, 2014). I triangulated the data to include industry publications and the company website. Additionally, the participants answered the questions to their best ability (see Wedding et al., 2013). Asking interview questions unrelated to the topic is not beneficial because this increases disorganization and reduces the chances of reaching data saturation (Wedding et al., 2013). The data collection process was important to the study because the data could be used to help companies identify useful strategies when outsourcing to the Caribbean.

The semistructured interview included 10 questions that I asked to gain insight into the strategic process of outsourcing. The participants carefully chosen for the study were knowledgeable through industry experience. The selection process included determining who are the decision makers within the organization and what roles they play in outsourcing. Interviewing participants face-to-face is important so that the researcher can view body language during the interview (Robinson, 2014). Furthermore, validity and reliability are key components in the data collection process (Aravamudhan & Krishnaveni, 2015). In order to address this area, I have applied the knowledge used by reliable sources such as Aravamudhan & Krishnaveni (2015) for member checking. Based on the conclusion of the Aravamudhan & Krishnaveni (2015) study, member checking proved to be reliable. Once the interview session was complete, following up with the participants would be a subsequent part of the process (Suri, 2011).

I provided all participants the informed consent form. This form allowed participants to review the interview questions and gain additional insight on the study. Participants had the opportunity to decide if they would participate and sign the consent form.

### **Data Collection Technique**

The data collection technique is important and must be aligned with the research topic. The goal is to collect data that offers insight to the main research question (Yin, 2014). For this qualitative study, the data were collected using phone interviews. Having multiple methods of collecting data was important because I needed to prepare for the unexpected (Anyan, 2013). Onsite interviews have advantages, such as observing body

language, making the participant feel comfortable, and making eye contact (Yin, 2014). Collecting data through Skype or Facetime is an alternative to the face-to-face interview. Although not conducted in person, there is still the opportunity for body language observation. Lastly, a phone interview was the final option utilized as a face-to-face or Skype interview were not possible. The disadvantage of the phone interview was the inability to see body language or make eye contact. During phone interviews, observation was limited to listening only.

There are several items that are useful to record interviews. A recording device is an option for an onsite interview. Prior to the interview session, testing the device is an opportunity to ensure there is clarity and limited background noise. It is important to make sure the participant can be heard. Secondly, Skype and Facetime have a recording feature that will be used if interviews are conducted using Skype or Facetime.

In addition to conducting face-to-face interviews, reviewing company websites and reading industry related journals are alternatives to gather data for the study (Yin, 2014). Company websites are a great resource to find out what is currently taking place within the organization that has not been discussed during the interview. Smith (2012) described the importance of using internet tactics to gain an abundance of information applicable to your research. Company websites can offer more information that will be valuable to the study and the research questions. Reading industry journals is an opportunity to learn what is happening across the industry in similar organizations, which may provide additional, useful information for the study.

I was the instrument used to conduct the interviews with participants. A recording device was used in the interview to record the interview sessions. The interview was conducted over the phone and not at the facility of the organization, which made the participants comfortable. The interview location should be decided prior to the interview by the participants. I used NVivo software to identify common themes from the interview and proper coding. Enhancing the data collection process included reviewing the transcript of the interview that was transcribed from the recording device. This ensured that all data provided by the participants were recorded and documented correctly.

### **Data Organization Technique**

I used NVivo 12 to help with the organization of the data collected and to explore common themes from different participants. Identification of recurring themes was important to determine that data saturation had been achieved because new information was no longer being collected from participants (Yin, 2015). When the participants did not provide any new information, I achieved data saturation.

The participants were coded to ensure differentiation and confidentiality. The coding method included P1, P2, P3, P4, and P5. The goal was to achieve data saturation. There was a possibility that the number of participants might need to increase if data saturation was not reached. The information given by each participant was transcribed using Microsoft Word to organize the data with the participant codes labeled. I organized each participant so that the information was kept separately.

I did not conduct a pilot study for this research. If used, the pilot study could have helped identify sample size, time constraints, resources available, etc. (Craig et al., 2013).

A pilot could have been time consuming when trying to find participants for this research. The data collected during a pilot is a test and would not be used for the actual study. Having a pilot study may include many participants or groups. The research that was conducted did not need a large group, so a pilot would not have been useful in this case.

### **Data Analysis**

The data analysis process used by researchers encompasses a variety of methods used to gather information from participants. I used Yin's five phase approach to analyze data and incorporate data triangulation and interviews. Yin (2014) described the data analysis process of methodological triangulation, which uses data gathered during semistructured interviews and compares the data to information available on company websites, industry journals, and other publications. For this study, I used methodological triangulation to verify the information from the sources discussed above. Utilizing the methodological triangulation concept for this study enhanced credibility (Heale & Forbes, 2013). Furthermore, I used the company website, industry publications, and journals to validate the information provided by participants. Methodological triangulation is one of the four methods that allow the researcher to test validity of the resources (Carter, Bryant-Lukosius, DiCenso, Blythe, & Neville, 2014). Additional resources, such as a company website, can offer a researcher exposure to data and information during post interview sessions. Moreover, industry journals and periodicals are a great resource to gain exposure to industry trends, or related information highlighting strategic outsourcing. Comparing information provided by participants and company websites enabled me to cross reference the information. I used the content that was identified during the data

analysis stage to determine additional ways to present the metrics (Manganelli et al., 2014).

Compiling and organizing the results of the interviews and the use of data triangulation is imperative. Furthermore, dissecting the data retrieved is important for data analysis. Grouping similar findings is a great way to analyze the data and identify common themes. According to Yerkic (2017), applying the KWIC coding method identifies the common word responses provided by participants. The data analysis process included using the KWIC method and color coding the categories to identify common themes and coding. Based on Yerkic's research, I grouped similar findings from the responses by keyword.

In order to group similar findings, I identified the common themes from the interview and the triangulated data. The common themes that were addressed in this study were related to the research question: effective outsourcing activities and identifying the relationships within the patterns. To group common themes, I focused on the relationships within the conceptual framework and the identified themes of this study, similar to the concepts presented by Yerkic (2017).

According to Yin (2015), there are five analytic phases to a qualitative study during the data analysis breakdown. The five phases are: (a) compiling, (b) disassembling, (c) reassembling, (d) interpreting, and (e) concluding. When compiling the data, I reviewed the interview answers and listened to the recording device to develop interpretations of the participants' responses. Similar responses were grouped and organized by topics addressing outsourcing strategies and overcoming cultural barriers.

The step-by-step process of the analytic phases was used as a blueprint to interpret the data and reach a conclusion (Yin, 2015). Disassembling the findings of this study entailed reviewing data and using the identified topics to code similar themes. Once the coding was implemented, the next step included identifying similar patterns from participants. Once no new information emerged from the interviews, I achieved data saturation. Further coding is not necessary once data saturation is achieved (Fusch & Ness, 2015). The interpretations of this study were addressed by the descriptive findings identified from the responses of managers and industry experts. I used charts to illustrate the patterns and results.

I was the instrument conducting the interviews with participants, and I used a recording device to record the interview sessions. The interviews were conducted over the phone, which made the participants comfortable. The participants decided where interviews would take place, including the phone interviews. NVivo software was used to identify common themes from the interview and ensure proper coding. A researcher uses coding to categorize the findings of the results (Davidson, Simpson, Demiris, Sheikh, & McKinstry, 2013). The data gathered from the data analysis process were entered in NVivo 12 software. The common themes identified in the findings were organized accordingly. Researchers use NVivo software as a helpful tool to organize the data (Sotiriadou, Brouwers, & Le, 2014). The groups of data consisted of strategies used in outsourcing and overcoming cultural barriers. I gathered information from industry websites as well as industry publications before loading the information into NVivo12 in order to extract the common themes provided by the participants' responses and to



identify consistency within the responses. Software query coding was also used in order to identify similarities and find existing relationship patterns in the participants' responses.

## **Reliability and Validity**

### **Reliability**

Reliability is an opportunity to provide material to researchers so that similar results are found (Noble & Smith, 2015). To meet this requirement, I provided content based on my research of strategic outsourcing in order to allow future researchers to utilize the results of this study. Furthermore, reliability is an opportunity to expand research and provide collected data so other researchers can use the information (Tiira & Lohi, 2014). Consistently analyzing the data and transcript helps ensure accuracy of the research. Dependability heavily relies on the longevity of the data and the results of the study (Anney, 2014). Member checking of data interpretations will address dependability in a study. In this study, member checking included reviewing all information provided by participants to ensure that my interpretation of their responses was correct.

### **Validity**

Validity in a study must include credibility, transferability, and confirmability. All components are important in order to present cohesive results that are accurate as a result of data interpretation (Kihn & Ihantola, 2015). My interpretation of the findings of the study relied heavily on the experiences of the participants, giving credibility to the research. When gathering the data from the interview process, researchers can make a connection to responses that are closely connected (Thomas & Magilvy, 2011). I

reviewed the interview transcripts of the participants and identified all areas that presented similar findings. Credibility can be enhanced through the micro examination of participants' responses and identifying similarities to tell a common story (Thomas & Magilyy, 2011). Confirmability was addressed in this study by reviewing the results of the interview questions and ensuring no personal opinions were incorporated in the findings. Mitigating biases was critical to this study. Transferability will allow readers and researchers to use this study for further exploration of the topic. It was imperative to reach data saturation in this study. Data saturation was achieved when the participants presented no new information. Interviewing industry experts in the field that have common knowledge of outsourcing in the apparel industry was key to achieving data saturation. I accumulated and identified similar responses, and data saturation was confirmed when no new information was presented.

Triangulating the data provided to company websites, industry publications, and related sources increased the chances of achieving data saturation. Achieving data saturation involved reviewing the content to the point that (a) no new information is collected during interviews, (b) no new themes emerge from the data, and (c) another researcher can replicate the study.

### **Transition and Summary**

The purpose of this qualitative single case study was to explore the successful strategic outsourcing strategies used in the apparel industry. The phenomenon continues to evolve, and new ideas have emerged since the 1980s. Organizations can apply various techniques and tools that have been identified and used across the globe; prior to

outsourcing engagement, organizations should be aware of the laws that help facilitate this business method. Understanding the laws of the countries that host the manufacturing companies is part of the success strategy.

In order to fully comprehend the business model of outsourcing, researching a particular company successful in this area is key, because the members of the organization have hands-on experience that can be used to help understand successful strategies. The information provided by the participants will also help organizations understand different cultures.

The goal was to achieve data saturation based on responses received from the participants of this case study. I prepared interview questions for organizational leaders and employees who are involved in the day-to-day activities of outsourcing. The participants shared industry related knowledge based on outsourcing to manufacturing companies in the Caribbean. The interviews were conducted over the phone and I used a recording device to collect the data. I used the NVivo 12 transcription feature to transcribe the interviews, then analyzed the data using NVivo 12 software.

In section 3, I explored the data provided and identified the recurring themes provided by the participants. Section 3 consists of the following sections: introduction, presentation of findings, application to professional practice, implications for social change, recommendations of action, recommendations for further research, reflections, and conclusion.

### Section 3: Application to Professional Practice and Implications for Change

#### **Introduction**

The purpose of this qualitative single case study was to explore the strategies that leaders in the apparel industry use to overcome cultural barriers when outsourcing internationally. Data were collected from three semistructured phone interviews with leaders of an apparel company in North America. I triangulated data from the participant responses with data from the organization's website. The participants requested phone interviews due to time constraints. The participants selected for this study were experts in their field and possessed the knowledge required for this study.

The participants' responses to the interview questions revealed important themes related to the topic such as cost and products. The overarching question for this study was the following: What strategies do leaders in the apparel industry use to maximize effective outsourcing activities and overcome cultural barriers? Using NVivo12, a review of the literature, and the TOC conceptual framework, I conducted data analysis and bracketed personal bias.

Findings from the participant interviews included strategic activities that impact costs and products. The cost of outsourcing internationally should be evaluated by organizations looking to implement this business model. Organizational leaders want to ensure the product is executed precisely and meets their standards. Organizations can experience benefits from outsourcing, such as lowering the cost of production; however, strategic planning in the early stages is crucial to the process (Choi & Beladi, 2014). According to Sharma et al. (2014), outsourcing increases productivity and reduces costs,

which supports organizations' goals of producing an abundance of goods and reducing expenses.

The findings of the study indicated strategies used by leaders within the organization to successfully maximize activities and overcome cultural barriers when outsourcing to the Caribbean. The first main theme that emerged from the interviews was training and implementation. The second theme was engagement in the community, which consists of vendor and business relationships. The third theme was use of local talent and management.

### **Presentation of Findings**

The data collection process for this single case study included three semistructured interviews with participants from an outsourcing apparel manufacturer using interview questions (see Appendix A). The participants requested conference calls because of the physical location and time constraints. After the interviews were conducted and recorded, I transcribed the audio recordings into Microsoft Word to interpret the data more easily. I used NVivo 12 software to upload the transcribed data, which resulted in identifying the recurring themes.

The conceptual framework used in this study was the TOC. TOC as presented by Goldratt and Cox (1984) is identifying limitations that may inhibit an organization from reaching its full potential and economic growth. The purpose of this concept is to identify constraints and ways an organization can implement change for process improvement. The interview questions in the current study were designed to elicit responses that provided guidance about areas of concern when outsourcing and ways to implement

strategies to overcome challenges. The themes that emerged from the data analysis were organized into broader themes because they provided a holistic overview of the strategic activities required to overcome cultural barriers. It is imperative to note the importance of outcomes such as cost and production when exploring strategies in overcoming cultural barriers. The three themes that emerged from the data analysis process were (a) training and implementation, (b) engagement in the community, and (c) use of local talent and management. Analysis of the data identified the strategic activities and plans for outsourcing and effective processes to overcome cultural barriers. The themes and findings that emerged from the participant interviews extended knowledge of effective strategies for outsourcing.

Hoang (2018) identified three key outsourcing strategies: (a) training, (b) communication and (c) performance management. I used the data collected to explore the strategies further. The participants' answers offered insights for any organization looking to outsource and addressed the overarching research question: What strategies are used by leaders in the apparel industry to maximize effective outsourcing activities and overcome cultural barriers?

### **Theme 1: Training and Implementation**

The first main theme that emerged from the interviews was training and implementation. According to Sharma et al. (2014), outsourcing increases productivity and reduces costs, which supports organizations' goals of producing an abundance of goods and reducing expenses. Yerkic (2017) suggested that organizations should understand the intricacies of strategic outsourcing prior to implementation.

Table 1 includes data drawn from the responses describing strategies to efficiently outsource to the Caribbean. Organizations seeking to outsource to the region should focus on these strategies. The table illustrates how frequently the themes appeared. The themes are (a) training, (b) implementation, and (c) development.

Table 1

*Training and Implementation*

Theme	Number	Percentage of all themes
Training	27	29
Implementation	24	25.8
Development	10	10.8

**Training.** One of the elements of outsourcing discussed by the participants was training, including both internal and external. The participants reported that training staff is a great way to deal with cultural barriers. P1 stated

The absolute best way to ensure that your staff understands cultural barriers is really immersing in the culture. So, we have our management teams actually spend time in the regions and cross-pollinate between the manufacturing and the locals from the regions.

P1 emphasized the importance of “the cross-pollination between them and our office on a regular basis so that we’re actually aware of and understand better those cultural difference before we even begin.” According to Wedding et al. (2013), individual cultures conduct business differently and details can be misinterpreted. P2 explained the importance of traveling to the facility and the time spent training staff. P2 stated “We debrief them to ensure they understand do’s and don’ts and how different offices or

countries handle business, to ensure that people are not going in unaware.” Training employees is a key component of outsourcing.

To effectively outsource, organizations must equip their staff with the knowledge and tools necessary to perform the services (Nagoev, Yushin, Smetanko, Bidova, & Gavel, 2020). Wibisono, Govindaraju, Irianto, and Sudirman (2019) further emphasized the importance of training suggested the partnership between all parties evolves into sharing knowledge. The strategic implementation of the TOC can help organizational leaders determine where employees lack skills or capabilities and rectify these with staff training. TOC is a strategic concept that leaders of an organization use to identify potential gaps in the services provided and the execution of knowledge transfer (Bauer, Vargas, Sellitto, Souza, & Vaccaro, 2019). Identifying the internal and external exchanges of information between all parties supports successful execution of training material.

**Implementation.** Having a plan of execution is imperative to the implementation of outsourcing. All participants in the current study described having a plan before and during the execution process. Choi and Beladi (2014) stated that the process of outsourcing must be implemented in segments. Organizations have to take the time to execute individual stages and evaluate all components before implementation (Choi & Beladi, 2014). The implementation stage includes an exchange of concepts, effective business practices, and resources within the organization (Lee & Lee, 2020). P3 stated “We choose a program we want to outsource; we try to look for multiple sources first, so we can evaluate options.” P2 noted the implementation process is also about determining



the program they want to outsource by factoring in which products are “more intricate and detailed.” All participants stated that research must be done before the engagement process. The concept and application of TOC provides organizations the opportunity to roll out an outsourcing plan in stages.

**Development.** Conducting business internationally and learning about new cultures and differences requires development. Various programs are implemented within organizations to foster staff development. Equipping employees with the proper cultural tools is imperative, according to P2. All participants agreed that proper staff development is key, including emerging staff within the culture. P2 suggested leaders “prep in advance the small details” and include as part of the preparation “training where we take language lessons.” Implementing development programs is fundamental for employee success in cultural understanding and engagement. Wibisono et al. (2019) noted an effective strategy to mitigate cultural difference will require training and development including awareness, sharing data, and collaboration. TOC aligns with the goal of staff development. The current study site organization identified the internal constraints of the limitations and capabilities of the staff. All participants noted that part of the development process was to encourage open dialogue among leaders and employees to ask questions and debrief employees on what should and should not be done in international business.

The findings that emerged from the participant interviews expanded the existing knowledge surrounding the practice of effective outsourcing. The existing literature emphasized the importance of training, implementation, and development to the

organization implementing outsourcing. The results of this study confirmed these existing business practices and extended the knowledge by demonstrating the importance of expanding the accessible employee skill sets.

### **Theme 2: Engagement in the Community**

The second main theme that emerged from the interview process was community engagement and vendor relationships. Wedding et al. (2013) mentioned the importance of understanding cultural barriers when conducting business internationally. P3 noted that leaders in the apparel industry who outsource to a different country encounter cultural barriers that can hinder the goods production process. For leaders in an apparel company looking to outsource, getting involved in the community is a way to overcome cultural barriers. The answers from the interviews provided recommendations for overcoming these barriers, including utilizing local talent to establish a connection between two different cultures, as suggested by P1.

Table 2 shows the processes leaders have used to overcome cultural barriers when outsourcing in the apparel industry. The recurring themes that emerged were community engagement and vendor relationships. These steps have been proven effective.

Table 2

#### *Engagement in the Community*

Theme	Number	Percentage of all themes
Community engagement	6	6.5
Vendor relationships	18	19.4

**Engage in the community.** To overcome cultural barriers, organizational leaders must become familiar with and engage with the community in which they are outsourcing.

All participants in the current study agreed that understanding the cultural differences while conducting business is imperative. P1 advised organizational representatives to become familiar with the language, which will allow the organization to better engage in the community: “The business practice goes beyond transaction but connects you with the community that you conduct outsourcing in.” To further explain the importance of understanding the language, P2 also stated “we want to make sure we are clear on both sides.” Organizations that do not take the time to understand the language can have trouble engaging in the community, which may impact their operations (Meuter et al., 2015). The participants in the current study described the importance of having an open mind when working and engaging with different cultures. The concept of outsourcing reveals the different cultures of the parties . Organizational leaders can use TOC to identify cultural differences and develop solutions beneficial to all parties. According to Bauer et al. (2019), identifying the constraints through TOC expands across all business engagement including vendor suppliers in local communities.

**Vendor relationships.** P3 expressed the importance of vendor relationships when outsourcing. According to P3, “outsourcing with vendors is about good working relationships; communicate with them often and try to visit them.” All participants emphasized the need to develop relationships with vendors when outsourcing. Relationships are imperative when working with businesses in different countries (Huo et al., 2015). P1 also described not only having business relationships but also seeking partnerships. The results of this study illustrated the importance of partnership in outsourcing relationships. According to the participants, working with vendors when

outsourcing requires building relationships to ensure production requirements are met and partnerships form an accord with vendors that manufacture goods. The partnerships between the organization and vendors can reduce production errors and save time for all parties, which is valuable when meeting deadlines. Participants discussed additional problems that can arise if no relationship is established with the vendor. Following and implementing social responsibility standards that align with the organization is imperative. This includes ensuring safety standards are met, employees are not working too many hours, and employees are hired in the correct format. Following these protocols protects the employees, the vendor, and the organization. According to Plugge (2015), establishing a relationship with vendors builds trust and enhances effective communication. Establishing a common objective agreed upon by all parties results in a partnership and a shared agreement (Wibisono et al., 2019).

Based on the participants' experience, an important aspect of formulating relationships with vendors is both parties sharing the constraints that may occur within their country, which can cause problems if they are undisclosed. By establishing these vendor relationships, an organization can seek local counsel to plan and execute strategies to combat potential challenges prior to the engagement process. According to the participants, this can include risk factors, economic stability, or stability of currency within the region or country. All participants agreed that it is crucial to ensure that vendors are experienced and confirm they are highly skilled in production. When outsourcing to another country, an internal challenge that arises is lack of an existing relationship with an outside vendor. As P3 stated, onboarding vendors in advance is

important. According to Gupta et al. (2015) identifying the constraints in the early development stage is imperative. TOC may be a helpful tool for organizational leaders in identifying weakness in vendor relationships. A vendor relationship must be established prior to any dialogue about cost saving practices and production in order to resolve this constraint. According to Cannon et al. (2013), the challenges faced by organizations outsourcing include external sources or services.

### **Theme 3: Use of Local Talent and Management**

The third theme that emerged from the interviews was use of local talent and management. Table 3 shows the organization using local talent and management when outsourcing internationally, a procedure that has proven to be effective.

Table 3

#### *Use of Local Talent and Management*

Theme	Number	Percentage of all themes
Use of local talent and management	8	8.6

**Use local talent and management.** A recurring theme identified during data analysis was utilizing local talent and management when outsourcing. Organizations are often unprepared to deal with the challenge of working with different cultures. One unique process that apparel companies can implement into their business model is engaging local talent and management from the countries to which they outsource. This business practice can help improve understanding of cultural differences and help overcome difficulties. P1 stated “having local management and local partners in place

helps alleviate some of those challenges, leverage local knowledge and management.”

All participants understood and recognized the importance of aligning the partner businesses, maintaining awareness of cultural differences, and engagement with local talent.

Incorporating the use of local talent into the business model has been effective for the study site organization throughout the years. Talent acquisition has implemented this strategy to meet outsourcing needs. Hiring locals when outsourcing promotes an environment of highly skilled talent (Seibel & Kabst, 2017). According to company documents, over 600 international positions have been filled by employees from local communities. P1 stated 82% of management positions were held by locals within those countries. This further demonstrates the significance of bridging the gap of cultural differences when outsourcing and using local talent. P2 stated that it is important to take these steps and processes to understand cultural differences when outsourcing internationally.

When addressing the internal challenges of cultural barriers as a result of outsourcing, participant responses have aligned with the process of TOC. Organizational leaders use TOC to provide direction and enable successful execution (Upreti, Sunder, Dalei, & Garg, 2019). All participants stated that by hiring local talent and management, the organization demonstrated ability to identify needed skill sets to conduct business globally and manage locally. P3 stated that this process includes investigation and evaluation. This is a successful demonstration of applying TOC to identify internal

challenges to proper execution. Engaging with local talent increases the quality of services and products over time (Rao & Balasubrahmanya, 2017).

The organizational leaders' beliefs in diversity and inclusion were an extension of the business model of using local talent. The benefits of hiring local talent in management positions were to also align the organization with the culture of the local community. P1 stated leaders from the local communities understand the nuances and how to best address issues that may arise in those regions. Successful engagement in global business relationships with vendors and locals results from implementing diversity and inclusion (Rosca, Mollering, Rijal, & Bendal 2019). Organizations outsourcing internationally have the opportunity to engage with local talent and management. The participants stated that the engagement process is about forming a strategic partnership in addition to identifying particular needs. The benefits of identifying outside vendors turned partners can increase likelihood of ongoing outsourcing services (Chen, Chang, & Lin 2019). This approach is beneficial to the local talent in the community as it provides new opportunities for advancement. According to company documents, partnerships with locals are based on training and the ability to build skill sets. Increasing skill sets of the local talent is a plus for all parties involved. According to company documents, as of 2019, over 800,000 training hours were conducted internationally.

### **Application to Professional Practice**

The findings of the current study may provide organizational leaders with effective strategies to maximize effective outsourcing activities and overcome cultural barriers. The themes identified in this study could facilitate both established and

emerging companies in outsourcing from initial development to implementation.

Outsourcing in the apparel industry requires a fundamental understanding of the business practice including identifying the internal issues an organization must resolve and implementing solutions to overcome these challenges (Caniato et al., 2015). Decision-makers in the apparel industry may be able to apply TOC to identify an organization's potential barriers to successful outsourcing, including cultural barriers. As stated by Upreti et al. (2019), TOC identifies ineffective strategies that can negatively impact an organization. Goldratt and Cox (1984) noted that TOC enables organizations to cross examine the internal hindrances to growth in order to maximize their potential for success. The internal review process of TOC may identify and resolve potential cultural barriers before implementing an outsourcing plan.

The findings of the study may be used by organization leaders to optimize outsourcing strategies and activities such as vendor engagement, implementation, working with local talent and management, training and development, and engaging with the community. In addition, P1, P2, and P3 discussed the key components to consider when implementing outsourcing and engaging with different cultures. Leaders in the apparel industry may use this information as a guide to outsourcing. According to Spithoven and Teirlinck (2015), each of the steps to successfully execute outsourcing internally and externally are necessary. Prajapati et al. (2019) emphasized the importance of keeping expenses associated with outsourcing low to remain competitive on a global scale.



The results of this study could be used to prepare leaders in the apparel industry with a fundamental understanding of the best engagement processes and the importance of relationship building with vendors. Wibisono et al. (2019) strongly emphasized the significance of engagement, interaction and developing a rapport between all parties involved in outsourcing. Training and staff development are crucial components, as is communication with vendors. Building good relationships and having open communication can reduce errors and ultimately save the organization money. Apparel companies outsource to save on cost, and good communication and relationship development with vendors will ensure this result. Reducing the expenses associated with outsourcing is imperative (Dolgui & Proth, 2013).

### **Implications for Social Change**

The potential implication for social change as a result of this study is economic growth for the recipient community. Leaders in the apparel industry could gain new skills as subject matter experts, resulting in promotions and increased revenue through keeping costs low. Offering training to expand the knowledge of leaders is an opportunity for long-term positive financial impact. Organizations will have finances for expansion if they outsource successfully. Allocated funds can be applied to grow the business elsewhere, for example in an increase in product offerings or hiring new employees. Communities that offer outsourcing services could benefit from the business partnership through improved living conditions for residents, and potential economic growth as a result of increased job opportunities. Gbosi (2019) stated a developed economy that cultivates economic opportunities results in increase employment and allocated funds to

improve the overall economy. Citizens could invest in their communities by increasing their buying power and investing in education, which are some of the fundamental steps to developing a successful society. The life expectancy of the population might increase because of access to healthy food options for their families.

### **Recommendations for Action**

Leaders in the apparel industry looking to maximize outsourcing activities and overcome cultural barriers must implement strategic plans of action and engage with the community to which they are outsourcing. The findings of this study presented useful and applicable methods that may be incorporated into current business practices. My recommendation to business owners, leaders, and decision-makers of variously sized companies is use the findings of this study as a reference when outsourcing. The strategic actions and plans I recommend are to establish a relationship with vendors, minimize cost and maintain quality of product, utilize local talent, engage with the community, and implement sufficient training and development. TOC is a tool that leaders can use to begin identifying internal constraints and apply strategic solutions to identified challenges (Cannon et al., 2013) before implementation of the outsourcing process. The results of this study may be beneficial for organizational leaders in employee training in preparation for outsourcing activities. I will distribute this research study through printed and electronic publication, at industry events, and during webinar courses.

### **Recommendations for Further Research**

Further research is recommended from the findings of this study. The first recommendation for further research is face-to-face interviews. Having the ability to

observe participants in-person is an opportunity to observe body language and make eye contact. The second recommendation is to conduct a multiple case study instead of a single case study. Interviewing leaders from multiple companies can add value in addition to a variety of experiences and perspectives. The final recommendation for further research is studying outsourcing focused on a particular country within the Caribbean, which could be an opportunity to determine a more specific and detailed strategic outsourcing model for organizations and countries.

### **Reflections**

The doctoral research journey has been enlightening and a dream come true. When I began the literature review process, it was time-consuming and often difficult. However, once I attended several residencies and began to work closely with my mentor, Dr. Matt Knight, I discovered a strategic process that worked for me. The data collection component of the research study was fascinating to me. I was able to listen with an open mind and not interject any biases based on what I have learned during my research journey. After collecting the data, I encountered a challenge when I began to analyze the information by using NVivo12 software. This required watching many hours of tutorial videos. I had the opportunity to work with a Walden tutor who helped me better understand how to interpret the data and translate it into charts. Once I accomplished this requirement, I was able to identify themes in the interviews. The complete doctoral journey from the beginning until now was more time consuming than I anticipated, but I continue to be humbled and grateful for this opportunity.

## Conclusion

Outsourcing is a continually evolving business practice in the apparel industry. Organizations use this business model to compete in the global marketplace and to find ways to reduce cost in order to grow their bottom line. The purpose of outsourcing is to reduce cost and increase revenue (Owens, 2014). The specific business problem addressed in this study is that some leaders in the apparel industry lack strategies to overcome cultural barriers when outsourcing business to partners of different cultures. Leaders require resources and tools to engage in outsourcing activities. The conceptual framework presented in this study, known as the TOC, can be used by apparel industry leaders to assist in identifying internal constraints that may be barriers to successful outsourcing. Overcoming these constraints may help organizational leaders to increase profit (Banerjee & Mukhopadhyay, 2016).

The findings indicate successful knowledge and strategic processes of the apparel industry that companies should consider when outsourcing to the Caribbean. The themes identified in the collected interview responses recommend training and implementation, engagement in the community, and use of local talent and management. The results of this study are an opportunity to explore outsourcing activities to the Caribbean and equip apparel companies to reach their goals of financial growth and expansion. Leaders in the apparel industry must implement successful strategies to outsource their production and equip their staff with tools to engage with different cultures. This process begins with internal examination and then external execution. Once company goals are achieved, the successful results can positively impact the community outsourced to. Outsourcing to the

Caribbean is an opportunity for North American companies to take advantage of the proximity, apply strategic strategies for cultural differences, and experience economic growth.

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## Appendix A: Interview Questions

### Interview Questions

1. What strategies do management use to increase profitability when using outsourcing?
2. Describe barriers or constraints you encountered when you first attempted to outsource?
3. What strategies worked the best when you outsourced?
4. What strategies do you recommend to organizations attempting to implement strategic outsourcing practices?
5. How much time and money did these successful strategies save your organization?
6. How do you prepare yourself for the cultural challenges that arise when you outsource internationally?
7. How do you train your staff to prepare for the cultural barriers that occur when outsourcing?
8. How do you address the currency, language, rules, and regulatory differences?
9. Does your company receive tax subsidies or government tax support from the foreign country in which you are working?
10. What other questions should I ask that you found to be helpful in overcoming cultural differences?

### Appendix B: The Interview Protocol

1. Start by introducing myself to the participant of the study.
2. Introduce the topic of the study, purpose of the study, and thank the participant for being available.
3. Go over the consent form with the participant.
4. Ask the participant if they have any questions or concerns before the interview.
5. Discuss the recording device that will be used during the interview session.
6. Once the recording starts, I will state and write the date, time, pseudo-name and location of the interview.
7. Begin the interview with the first question followed by the remaining nine questions.
8. Once interview session is complete, inform the participant they will be given the transcript to review and ensure accuracy of content.
9. At the end of the interview, I will thank the participant for their time and for contributing to the research.