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## **Strategies for Small Business Owners to Sustain Their Businesses in a Competitive Market**

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*Walden University*

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# Walden University

College of Management and Technology

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Michael Hicks Jr.

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Walden University  
2021

Abstract

Strategies for Small Business Owners to Sustain Their Businesses in a Competitive  
Market

by

Michael Hicks Jr.

MS, University of Phoenix, 2013

BS, Southeastern Oklahoma State University, 2011

Doctoral Study Submitted in Partial Fulfillment  
of the Requirements for the Degree of  
Doctor of Business Administration

Walden University

August 2021

## Abstract

Half of new small business startup establishments fail to survive the first 5 years of operation. New small business owners are concerned with competitiveness, as the failure rate increases for those establishments after the first 10 years. Grounded in Porter's competitive advantage theory, the purpose of this multiple case study was to explore competitive strategies small business owners use to sustain their businesses beyond 5 years. Data were collected from semistructured interviews with owners and managers of three small businesses in the restaurant industry in a large metropolitan city in Texas and reviews of organizational documents. Data were analyzed using Yin's five-step process. Three themes emerged: personalizing customer service, hiring talented employees, and operating at low cost. A key recommendation is for small business owners to build customer relationship strategies for personalizing customer service. Social change implications include the potential to sustain small restaurant businesses and create jobs to improve economic stability in communities and increase tax revenues for funding of schools and economic development, which could reduce poverty rates in local communities.

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## Dedication

I dedicate this body of work to my family. I want to thank my wife, Bridgette Hicks, for persuading me to go back to school and complete Walden University's DBA program. Because of her, I have had a partner to go through this doctoral process with me. She has helped me stay on top of my schoolwork. During my doctoral program completion, my wife and I had our first child, Michael Anthony Hicks III. I hope to set an excellent example for him by completing my doctoral program. I also dedicate this body of work to my father, Michael, Sr., and mother, Shirley Hicks, for laying the fundamental and educational foundation I needed to complete my doctoral program.

I also dedicate this work to the ancestors that prayed for me like my grandmothers, Bobbie Glenn-Jones and Louise Hicks, and my great grandmother, Idea-Mae Hicks. They worked hard for their children's children to complete school because they were not in the position to do so. I hope to make them proud as a husband, father, son, and grandson. I carry the name Hicks with honor and continue to do God's work with my education.

## Acknowledgments

First, I want to give honor and thanks to God, who continuously helps me in every aspect of my life. God gave me the wisdom, knowledge, and confidence to complete this study. My sincere gratitude goes to my committee chair, Dr. Matthew Knight, for his guidance and advisement through my doctoral journey. Dr. Knight's vital critique, patience, and diligent assistance helped me get through the most challenging moments of being a doctoral student. Dr. Knight never gave up on me, he guided me in the right direction, and he was honest with me. I am a better student today because of Dr. Knight. I also thank my second committee member, Dr. Roger Mayer, for his positive feedback and kind assistance.

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## Section 1: Foundation of the Study

Small business owners account for a significant portion of job creation in the United States that fuels the economy yet fails at alarming rates (Artinger & Powell, 2015; Cader & Leatherman, 2011; Small Business and Entrepreneurial Council, 2016). The U.S. Small Business Administration (SBA, 2016b) noted that 99.9% of all businesses operating in the nation are small businesses. Small businesses represent 48% of all private-sector employees and provide 41.2% of the nation's private-sector payroll (SBA, 2016b). Researchers from various disciplines have agreed on the importance of small business success in creating jobs, wealth, and economic and social developments (Omri & Ayadi-Frikha, 2014).

Close to 50% of small business owners close their small businesses by the 5th year, and only one third of small business start-ups survive for 10 years (Small Business and Entrepreneurial Council, 2016). Researchers indicated that small businesses tend to have a higher failure rate than large organizations, although small businesses are the engine of a country's economy (Bloch & Bhattacharya, 2016; Lo et al., 2016). Many small business owners' challenges include developing and integrating innovative strategies to sustain long-term growth (Adams et al., 2016). Business survival depends on achieving and maintaining a competitive advantage over other businesses in the same industry as a critical strategy (Kaleka & Morgan, 2017). Therefore, the objective for this study involved exploring the competitive strategies small business owners use to sustain their businesses beyond 5 years.

## **Background of the Problem**

The SBA (2017) defined a small business as an independent operation that employs fewer than 500 employees. The number of small employers increased after a decline during the last recession from mid-2009 to 2011, and the number of nonemployers has gradually increased, from 15.4 million in 1997 to 23.8 million in 2014 (SBA, 2017). Small businesses tend to be owned by independent operators with intellectual knowledge about their industries or fields and may operate as sole proprietorships, corporations, or any other format recognized by federal, state, or local governments (Anastasia, 2015). Small businesses in a free-market economy contribute to society's development (Rosario, 2017). The U.S. economy depends on small businesses' health, representing 99.9% of total U.S. businesses (Hayes et al., 2015).

The failure of small business owners occurs often throughout the United States, with 75% of small businesses closing forever before achieving 5 years of operation; these failures negatively affect not only local economies but the economy of the nation as a whole (SBA, 2014). Historically, there has been a problem with small businesses sustaining operations for more than 5 years because small business owners lack the management skills necessary for becoming successful competitors (Lofstrom et al., 2014; Warren & Szostek, 2017). Consequently, exploring the factors that lead to the dissolution of a small business is important to enabling small businesses to be successful for many years (Koyagialo, 2016).

### **Problem Statement**

Small business start-ups employ almost half of private-sector employees in the United States but lack sustained success at an alarmingly high rate (SBA, 2016b). From 2004 to 2016, more than 50% of new small business start-ups did not survive the first 5 years of operation, and about one third of those establishments during that time frame survived 10 years or longer (Small Business and Entrepreneurial Council, 2016). The general business problem was small business owners who do not remain competitive in the marketplace may have an unsuccessful business experience. The specific business problem was small business owners lack competitive strategies to sustain their businesses for more than 5 years.

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore competitive strategies small business owners in the restaurant industry use to sustain their businesses beyond 5 years. The targeted population for this study included three small business owners and managers in the restaurant industry in a large metropolitan city in Texas, who have created successful strategies to remain competitive and profitable for at least 5 years. The implications for positive social change include community impact such as local school funding, low poverty rates, increase community development from business innovation, employment opportunities, and increasing the growth potential of small businesses.

### **Nature of the Study**

Researchers conduct research via qualitative, quantitative, and mixed methods (McCusker & Gunaydin, 2015). Researchers use the quantitative method to identify and isolate specific variables within the context when examining correlations, relationships, or causality (Park & Park, 2016). For this study, I did not need to test hypotheses for examining differences or relationships among variables. Researchers conduct mixed-methods research to acquire multiple perspectives because one method may be insufficient to view or clarify some problems (Razali et al., 2016). I did not employ the mixed-method approach because there was no need to use the quantitative method. Researchers use qualitative methods to understand phenomena and for building new theories and making conceptual advancements of knowledge (Kopf et al., 2016). In this study, I explored the phenomenon of competitive strategies small business owners use to sustain their businesses beyond 5 years; therefore, I used the qualitative method.

The qualitative method includes several principal designs, such as ethnography, phenomenology, narrative, and case study. Researchers conduct an ethnography when they have a focus on exploring cultures interacting with each other (Park & Park, 2016). Using a phenomenological approach offers a descriptive and interpretive design for investigating participants' physical, emotional, expressive, and sociocultural dimensions of experiencing phenomena in their personal lives (Küpers, 2017). Using a narrative design requires researchers to gather the life stories and personal experiences of individuals or small groups of people (Hunt, 2014). A case study design is used to detail the complexity of one case investigation of phenomena within bound systems (Park &

Park, 2016). Yin (2018) explained that when the researcher chooses to do a multiple case study, the researcher can analyze the data within each situation and across different situations, unlike when a researcher decides on a single case study to focus on a unique organization. The single case study and the multiple case study differ because a multiple case study involves several units of analysis or cases, such as three businesses, to understand the similarities and differences among each; however, the single case study involves focusing on one unit of analysis, such as one business (Baxter & Jack, 2008; Stake, 1995). Generating evidence by studying multiple cases gains strength and reliability (Baxter & Jack, 2008). Another advantage of performing a multiple case study involves using several cases for developing convincing findings from ample empirical evidence (Eisenhardt & Graebner, 2007). Researchers use multiple case studies to explore research questions and create theoretical evolution (Eisenhardt & Graebner, 2007). I used the multiple case study design to investigate the different competitive strategies small businesses develop and deploy to remain sustainable beyond 5 years.

### **Research Question**

What competitive strategies do small business owners use to sustain their businesses beyond the first 5 years of operation?

### **Interview Questions**

I asked the following eight interview questions of each participant to learn about their small businesses' competitive business strategies:

1. What strategies have you implemented to sustain your small business?



2. What entry boundaries have you faced from the marketplace that made it difficult for you to start your small business?
3. What characteristics are important to you as a small business owner to sustain your business for at least 5 years?
4. What strategies do you use as a small business owner to improve your business operations?
5. How do you test the effectiveness of your strategies to see what does work and what does not work?
6. How do you continue to remain sustainable with your business with big companies in the same marketplace?
7. What kind of customer services strategies do you use to maintain the customers you have while also trying to gain new customers?
8. What additional information can you provide about strategies you have used to sustain your business at least 5 years?

### **Conceptual Framework**

The conceptual framework supporting this study was Porter's competitive advantage theory. Porter (1980) concluded that companies must optimize their value chain to outperform their rivals and suggested that businesses can use certain generic strategic approaches to outperform other organizations in an industry. Porter's framework contains the three generic competitive strategies of (a) cost leadership, (b) differentiation, and (c) cost focus (Farrell, 2015). The critical element of Porter's competitive strategy theory, also defined as a competitive advantage, is the position from which organizational

leaders create more value and attract more sales than their competitors (Menon & Yao, 2017). Differentiation strategies based on innovation can create a dynamic market environment in which it is challenging for competitors and customers to predict and react to; this unpredictability could give the innovator a substantial advantage over its competitors (Miller, 1986). Porter's competitive strategy theory provided a useful conceptual framework for understanding the competitive strategies small businesses use to sustain them beyond 5 years.

### **Operational Definitions**

*Small business:* A small business is determined according to either the number of employees over the past 12 months as fewer than 500 employees for most mining and manufacturing industries or the average annual receipts accrued during the most recent 3 years as less than \$7.5 million for most nonmanufacturing industries (Beesley, 2014; SBA, 2016a).

*Small business failure:* When the owner does not succeed in business beyond 5 years. In addition, business failure occurs when a business owner files bankruptcy, ceases operations, or is breaking even with neither a livable income nor a fair return to the investors from the business (Ropega, 2011).

*Small business owners:* These individuals conceive the idea for the business, launch the business, and assume the risk of running a small business venture while also generating new economic activities in their communities (Turner & Endres, 2017).

*Strategy:* Porter (2005) stated that strategy is what makes a small business unique by providing direction, giving a distinct competitive advantage, building brand

reputation, setting the right goals, adding superior performance, defining a market position, and creating a unique value proposition. Porter also stated that in formulating strategy, small business owners choose what they will and will not do, what customers they will serve, and what business needs they will meet at what price. Strategy often requires a different value chain with reinforcing structures and sustaining systems.

*Sustainability:* In terms of businesses' corporate activities, sustainability refers to the environmental, social, and governance dimensions of a business's operations and performance (Sustainability Accounting Standards Board, 2017). Sustainability is generally understood in terms of balancing socioeconomic-environmental objectives (Nayak, 2017).

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

#### **Assumptions**

Research assumptions are essential issues, ideas, or positions found anywhere from the beginning of the study design to the final report that are taken for granted and viewed as reasonable and widely accepted (Theofanidis & Fountouki, 2019). Yin (2018) suggested that a proper case study has to rely on samples with appropriate knowledge. Research assumptions and biases are commonplace and inherent to any study's content. Leedy and Ormrod (2016) stated that without them, the research problem itself could not exist.

During this research process, I made several assumptions. The first assumption was that research participants would provide truthful and honest answers to the questions asked during the face-to-face or video conference interviews. I also assumed every

business owner interviewed had a business strategy to remain competitive in their marketplace.

### **Limitations**

Limitations represent a study's potential weaknesses or problems that can affect the applicability of the findings to the target population (Utian & Maamari, 2014). Researchers use the qualitative approach to provide insights regarding investigated topics, but the results may not represent the broader population (Gazdecki, 2018). A limitation of this study affected generalizing the findings to a large population because the phenomena came from a small group of business owners. Another limitation of this study is that researcher bias could have influenced the collected data and findings negatively. Bias exists in all study designs, and although researchers should attempt to minimize bias, outlining potential sources of bias allows for a critical evaluation of the research findings and conclusions (Smith & Noble, 2014).

### **Delimitations**

According to Yin (2018), delimitations are the boundaries of the research set by the researcher. Delimitations are set by the researcher as the boundaries or limits of their work so that the study objectives are possible to achieve (Theofanidis & Fountouki, 2019). The delimitations of this study were the population of participants and location. The first delimitation of this study was the geographical location. The study took place in Texas, so the results did not represent every small business in the United States. The second delimitation of this study was that the sample size of the study participants is small. The sample consisted of three small business owners and managers in the

restaurant industry in Texas who have created successful strategies to remain competitive and profitable for at least 5 years. This sample size was small because I carefully reviewed each participant's company, website, and online marketing to meet the qualifying criteria of a successful business owner remaining competitive for over 5 years.

### **Significance of the Study**

This study may be significant because it could benefit small businesses' sustainability. In this study, small business owners shared the leadership strategies used to sustain their businesses longer than 5 years. The implications for social change in this study can positively influence social conditions for citizens and communities.

### **Contribution to Business Practice**

Small business owners in any industry may benefit from the findings of this study. The findings from this study could offer both theoretical and practical contributions for determining the critical internal and external strategies that can lead to small business success. Concepts of cost leadership, differentiation, and focus are still relevant in recent studies as of 2017 (Hales & McLarney, 2017). With the information provided from the current study, small business owners could develop and implement competitive strategies to improve and sustain their competitiveness in their marketplace. Based on this study, small business owners could evaluate their current strategies to remain sustainable for business and increase their possibility of earning and growing profits.

### **Implications for Social Change**

Society and the economy could benefit from the results of this study. Small business innovation is needed to become the engine of economic development and a

source of competitive restructuring of the economy (Sabden & Turginbayeva, 2017). The positive social change implications for small businesses include increasing economic stability for surrounding communities, funding for local schools, employment for citizens, and communities' development as well as lowering poverty rates.

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

The process of conducting a literature review involves accessing, analyzing, comparing, and summarizing the literature related to a study with the goal of understanding the breadth and depth of the existing body of work and identifying gaps to explore (Xiao & Watson, 2019). A literature review is more than an exhaustive list of all that has been published on a topic; it should be a personal but unbiased synopsis of information that provides a balanced view that conveys fundamental information, current thoughts and findings, and inconsistencies and conflicts between research methods and findings (Winchester & Salji, 2016). By summarizing, analyzing, and synthesizing a grouping of related literature, a researcher can identify specific gaps in research and develop new theories or hypotheses (Xiao & Watson, 2019).

My objective in this academic literature review was to explore relevant literature on competitive strategies used by small business owners who sustain their businesses beyond 5 years. In presenting this information, I have sought to convey depth and understanding of the topic while identifying the need for the study. I reviewed articles available in databases accessible through the Walden University Library and Google Scholar and on journal and government websites. The research databases searched included (a) ABI/INFORM Collection, (b) Business Source Complete, (c) Emerald

Insight, and (d) Sage Journals. Key search terms included *small business strategies*, *small business failures*, *small business sustainability*, and *competitive strategies*.

The literature review is organized into the following six main categories: competitive strategy theory, Porter's five forces model, small business importance and failure in the United States, marketing in small businesses, consumer relationship, and findings from the research literature review. In the competitive strategy theory subsection, I explore the background of the theory, the importance of the theory as it relates to sustaining small businesses, and criticisms of the theory. In the subsection on Porter's five forces model, I explore the history of the model, its effectiveness for small businesses, and criticisms of the model. The small businesses in the United States subsection contains the definition of a small business, the small business failure rate, and the importance of small businesses to the United States. The next subsection includes branding strategies that small business owners use to sustain and grow their consumer base against bigger competitors, including brand marketing with the use of social media and new technology applications. Next, the consumer relationship subsection involves a discussion of consumer value and its connection to small businesses. Finally, I summarize the findings from my literature review.

### **Competitive Strategy Theory**

In this study, I used Porter's (1985) competitive strategy theory as the conceptual framework. Porter's *generic strategies* are considered the definitive guides for businesses seeking to establish and maintain a competitive advantage (Hales & McLarney, 2017). Porter identified three mutually exclusive generic strategies—(a) cost leadership, (b)

differentiation, and (c) focus—that an organization can leverage to establish and maintain a competitive advantage.

### ***Background of Competitive Advantage Theory***

According to Porter (1985), competitive advantage grows out of the value the business creates for its consumers that exceeds the cost of creating the product or service. Porter stated that value represents the amount of money buyers will pay for the product or service; however, businesses achieve superior value by offering lower prices than competitors for equivalent benefits or by providing unique benefits that more than offset paying a higher price. The two basic types of competitive advantage are cost leadership and differentiation (Porter, 1985).

Porter (1985) argued that a company can achieve competitive advantage by providing consumers or buyers more value at a lower price than its competitors provide as a cost leadership vehicle. The second way to gain competitive advantage involves performing activities in unique ways that create perceptions of more value among consumers (i.e., differentiation) than competitors create and enable the company to charge a premium price. Porter suggested that a company can dominate its competitors either by offering its product or service at a lower cost or by performing differently from other businesses with its customers. Porter argued that there are no other ways to gain competitive advantage and, in fact, suggested that companies must avoid earning a status known as *stuck in the middle* of the road. The use of these strategies can help a company improve and gain a competitive advantage over its competitors.



### ***Cost Leadership***

Cost leadership is a company's ability to produce a product at a lower cost than competitors. Cost leadership, commonly known as low cost, is a strategy that a company can apply in a competitive rivalry (Nasri & Ikra, 2017). The method involved in this strategy is to press down cost as low as possible relative to competitors. Porter (1980) found that only one company in a specific industry can be the cost leader (Argyres & McGahan, 2017). In order to reach the cost leadership advantage, a company's leaders must pursue a cost-leadership mindset and be willing to discontinue any activities in which they do not have a cost advantage (Bertozzi et al., 2017). Company leaders should also consider outsourcing activities to other organizations with a cost advantage.

A cost advantage can be achieved from a variety of sources but also depends on the structure of the industry (Kiprotich et al., 2018). Businesses might incorporate the quest for economies of scale, restrictive innovation, and special access to crude materials and different elements to achieve a cost advantage. There are multiple ways to achieve cost leadership, which include, but are not limited to, mass production, organizational adeptness, minimizing costs, maximizing output, targeted advertising, total quality management, reducing overhead prices, and benchmarking (Kurt & Zehir, 2016). Lower costs result in higher profits on the goods and services offered. If businesses fail to produce enough profit on goods and services, lowering manufacturing cost can lead to an advantage over competitors.

### ***Differentiation***

A business gains differential advantage when its products or services are different from those of its competitors. A business achieves a differentiation advantage by offering unique products and services and charging a premium price for them (Porter, 1985). A differentiation strategy is based on the concept that a business's strategy has different and unique qualities purchasers will value (Bao & Li, 2016). A generic differentiation strategy involves creating a market position perceived as unique across the industry as well as sustainable over time (Porter, 1980).

By adopting a differentiation strategy, an organization becomes likely to increase its investments into organizational inputs and processes for delivering premium products or services (Ren & Guo, 2016). The several approaches to differentiation include differences in design, brand image, number of features, and technology (Sihite & Simanjuntak, 2015). Applying a differentiation strategy may mean differentiating along two or more of these dimensions. Effective use of a differentiation strategy based on research and development leads to brand loyalty and reduces the effect of demand on price elasticity (Chege & Bula, 2015). If customers see a product or service as beneficially different from other products, they may be willing to pay more for it.

### ***Focus***

Focus involves the business leaders' choice of competitive scope. Some businesses target broad industry segments, whereas other companies focus on narrow segments (Gure & Karugu, 2018). A narrow strategy involves serving a certain clientele to the exclusion of others in the market, while a focus strategy forms from a combination of the cost leadership and differentiation strategies.

A focus strategy can emerge from either a cost leadership or a differentiation strategy aimed toward a narrow, focused market (Anne, 2015). Focused cost leadership describes the ability of a company to offer a product to a niche group of customers or niche market at the lowest price in the market (Rizea, 2015). A focused cost leader caters to extremely cost-sensitive customers by offering products at the lowest prices in the niche market. Focused differentiation, meanwhile, involves offering unique products to a niche market and target group (Rizea, 2015). Those who use focused differentiation emphasize extremely rare, unique, custom-made, or specialized products in a high-end niche market.

### ***Competitive Advantage Strategies in Small Business***

Small business owners use competitive strategies to separate themselves from their competitors. The competitive behaviors of small businesses differ from those of large organizations in their managerial, financial, and organizational structures and their vulnerability to environmental changes (Gerard, 2018). Small- and medium-sized enterprise owners have the potential and promise to generate competitive advantage that eventually leads to superior business performance (Eniola & Entebang, 2015). Small- and medium-sized enterprise leaders need to research and use their knowledge resources to enhance their organizational performance in a competitive environment (Eniola & Entebang, 2015).

According to Salavou (2015), Porter introduced competitive generic or business-level strategies to focus particular attention on the intermediate level of the business or strategic business unit level. Porter's (1985) generic strategies of competitive advantage,

which include the low-cost leadership strategy, differentiation strategy, focus strategy, and combination strategy, significantly influence the organizational performance of small and medium businesses (Gure & Karugu, 2018). The ability to identify and apply the competitive strategies necessary to create a competitive advantage dictates whether a business succeeds or fails (Gure & Karugu, 2018).

### ***Criticism of Porter's Competitive Advantage Theory***

Porter's (1980) generic strategy for competitive advantage has been subject to several lines of criticism (Gould & Desjardins, 2015). The term, competitive advantage, refers to competition and to the initial military use of the strategy concept; however, the problem is that even assuming that it would consider the initial meaning of the concept coined by Greeks, the ultimate goal of war or competition is that an entity will survive (Bacanu, 2016). Porter determined that a prerequisite to success is choosing a less intense competitor or possibly selecting an industry without competition. Choosing an industry with less intense competition is supported by other researchers, such as Brandenburger and Nalebuff (1997) and Kim and Mauborgne (2004).

Brandenburger and Nalebuff (1997) coined the term *co-opetition* to denote an intermediate stage between competition and cooperation. They contended that co-opetition better reflects the current realities of the business world, where imperfect competition is the rule and requires some form of cooperation, including adherence to some state regulations. Kim and Mauborgne (2004) launched the concept of the *blue ocean strategy* to support the idea of searching for new industries where there is no competition. Both the co-opetition and blue ocean strategies suggest that the logic of

competition has become more complex. The nature of entities that compete has changed as a result of current corporations' arrangements and their new links with the state as a regulator of competition. If businesses participate in a national strategic plan managed by the government, then they become more dilemmatic and dramatically increase the number of possible configurations, which completely devalues the importance of competitive advantage (Bacanu, 2016).

Another major criticism of Porter's (1985) model is that it is appropriate for large organizations because their risk-taking activities to achieve economic goals are higher than smaller organizations (Eze et al., 2017). Though Porter's broad strategies look more robust in developing competitive edge, when combined with the resource-based view, Porter's competitive advantage theory neglects the number of roles played by actors in matters relating to information technology adoption behavior by small business managers (Eze et al., 2017). Instead, the theory's major emphasis is how businesses can engage with the five forces to attain competitive advantage.

According to Klein (2001), Porter's (1985) recipes for achieving competitive advantage are highly prescriptive. Porter asserted that businesses could achieve competitive advantage through either cost leadership or differentiation. Furthermore, Porter advised businesses to avoid becoming stuck in the middle. These formulae have been widely discredited. For example, reporting on research in a financial services firm, Knights and Willmott (1992) found the model difficult to follow in practice because the costs of the firm's own operations, let alone those of competitors, are not calculable and products are easily imitated. Pitelis and Taylor (1996) argued that a value-for-money

strategy, while becoming preferred for corporate success, did not benefit businesses and caused companies to become stuck in the middle financially. From these sources, Klein concluded that Porter's specific recommendations for achieving competitive advantage lacked sufficiency.

### **Porter's Five Forces Model Framework**

In 1979, Porter developed a model for analyzing the structure of an industry. The five forces in the microenvironment cause challenges and put pressure on a company's revenue-making capabilities (Shokeen, 2016). According to Porter (1998, 2008), the five forces model represents a competitive analysis tool for assessing profitability within an industry and shaping a business's competitive strategy. The five forces encompass the threat of new entrants, intensity of rivalry, bargaining power of buyers, threat of substitutes, and bargaining power of suppliers (Mathooko & Ogutu, 2015). These five forces operate under the assumption that the external, competitive environment imposes a significant influence on strategy development and can erode a company's profitability. Porter applied the engineering economics approach when designing the five forces (Shokeen, 2016).

#### ***Threat of New Entrants***

New entrants into the market can present themselves as threats. The profitability of a whole industry sector depends on the number of potential and existing competitors (Lüttgens & Diener, 2016). Monitoring the threat of entrants can help in developing strategies against new competitors (Lüttgens & Diener, 2016). New businesses operate to gain a market share, apply pressure on costs and prices across the competition, and

acquire the investments needed for competing successfully (Porter, 2008). Porter (1979) described the threat of new businesses to an industry as directly related to the barriers to entry for a particular industry and argued that the actual entry of new competitors does not drive competition. Porter saw the threat of new entrants to the industry as driving competition and impacting the profitability within an industry.

The threat of new entrants depends on whether the industry presents high or low barriers to entry (Mathooko & Ogutu, 2015). Entry barriers deter and block potential business operators from entering a market profitably (Kiandiko, 2007). Entry barriers originate from brand identity, proprietary product differences, economies of scale, capital requirements, proprietary low-cost product design, switching costs, distribution channel access, absolute cost advantages, proprietary learning curve, access to necessary inputs, government policy, and expectations for retaliation (Kiandiko, 2007). Entry barriers can dictate how new businesses enter the market and how these start-up businesses ultimately become competitors.

### ***Intensity of Rivalry***

The nature of the competition between businesses drives the intensity of rivalry (Mahat, 2019). Competition between rival companies and rivalry among existing businesses often poses the greatest force in five competitive forces (Nurlansa & Jati, 2016). According to Nurlansa and Jati (2016), a company's strategy can be successful if it provides a competitive advantage over rival companies' run strategy. One company's change in strategy might lead to a counterattack from a rival company that includes lowering prices, improving quality, additional features, provision of services, extending

warranties, and increasing advertising (Nurlansa & Jati, 2016). Porter (1980) acknowledged that every company is unique, and a company's unique characteristics can impact its competitive situation in the industry. Furthermore, industrial businesses' competitive advantage thinking affects industry rivalries and the likelihood of sustainability (Porter, 1980).

### ***Threat of Substitutes***

Small businesses have to be aware of product substitution. A substitute performs the same function as an industry's product but through a different means (Porter, 2008). The existence of substitutes for any industry's products and services imposes a limit on the industry's potential and establishes a ceiling on the industry prices for products and services (Adi, 2015). Porter (1979) noted that more attractive the price for performance trades on substitute products reduces opportunities for the industry's overall profit potential. The threat of substitutes is often indirect when a substitute replaces a buyer's industry product (Alexandros & Metaxas, 2016). Substitutes that appear different from standard industry products can be overlooked by businesses that fail to recognize competitive rivalries. Businesses that do not account for substitutes and do not ensure consumers recognize performance reduce their marketability, profitability, and growth potential (Alexandros & Metaxas, 2016). If small businesses do not recognize substitutions in their market, their businesses could stagnate.

### ***Bargaining Power of Buyers***

Porter identified the bargaining power of buyers in 1979 as one of the five forces models used to analyze an industry's competitiveness. Influential customers use their



bargaining power to demand better service or product quality, more services from a business, or reduced prices for currently offered products and services (Eskandari et al., 2015). The consumers buying the products or services have high bargaining power when they are knowledgeable about prices within the industry and aware of the rivalries between businesses or the overall competitiveness of the industry (Eskandari et al., 2015). The extent of buyers' bargaining power could either reduce or increase business income, especially in a hypercompetitive market landscape (Omillo-Okumu, 2019). Buyers develop bargaining power through price sensitivity, knowledge level, cooperation between buyers, switching costs, and resale buying (Omillo-Okumu, 2019). Powerful buyers can ultimately diminish profitability among small businesses.

### ***Bargaining Power of Suppliers***

Suppliers represent one of Porter's (1979) five forces putting pressure on companies and causing increases in prices and reductions to product and service access. The bargaining power of suppliers mainly relates to raw materials, components, labor, and services provided to small businesses (Chege & Bula, 2015). When fewer suppliers are available, small businesses lack choices for acquiring needed components, parts, and resources. Consequently, suppliers dictate the prices for the goods needed by the small business owners. Suppliers also dictate the availability of those goods and resources (Chege & Bula, 2015). The main factors contributing to the bargaining power of suppliers include suppliers dictating costs, degree of differentiation of inputs, presence of substitute inputs, distribution channel strength, and supplier competition (Chege & Bula, 2015).

For small businesses to operate, the leaders need inputs that include labor, machines, raw materials, and services (de Oliveira et al., 2015). The costs of these inputs can significantly affect profitability. Suppliers with high bargaining power put small businesses in a weak position and cause them to pay a higher price for their inputs or to accept lower quality or service (Porter, 2008). Small businesses that must use suppliers need to understand how suppliers influence their operations and delivery of products and services (de Oliveira et al., 2015). Suppliers' bargaining power affects buyers' competitive environment and buyer's ability to achieve profitability.

### ***Porter's Five Forces Model Strategies in Small Business***

Business owners can analyze their competition based on their company's place in the market using Porter's (1979) five forces model. Businesses assess their capabilities internally and use those assessments to neutralize potential threats and reduce the effect of their weaknesses on their competitive advantage (Daniela, 2014). According to Peralta and Viltard (2015), Porter's (1980) five forces model can be used by businesses to identify internal issues that hinder their sustainability and to address those internal issues. Porter's five forces model provides competitive performance indicators for benchmarking with current and potential rivals. Porter's fundamental premise was that business owners need to differentiate their businesses from others by providing a unique product or service, and owners should focus on a specific market niche. Understanding competitive forces and industry structure can help small business owners build competitive strategies for the future.

### ***Criticism of Porter's Five Forces Model***

Porter's (1979) five forces model has been subject to criticism even though it is among the most widely applied management models (Dulčić et al., 2012; O'Shaughnessy, 1984; Speed, 1989). One criticism has been that Porter used no empirical justification for choosing the five environmental forces to prove validity (O'Shaughnessy, 1984; Speed, 1989). Other scholars have also criticized the model's static nature as a challenge to innovation in a rapidly changing industrial structure that may significantly impact some industries more than others (Dess et al., 2006). Brandenburger and Nalebuff (1995) noted that Porter's five forces model ignores the pivotal role of complementary forces that may be present in an industry's overall structures by focusing on the rivalries between individual companies. According to Thurlby (1998), Porter's five forces model is static and does not take account of time. Thus, it is much more challenging to determine markets with higher competition dynamics because they can change quickly. Porter's five forces model demands a steady creation of new models. Dulčić et al. (2012) criticized the lack of emphasis on the time dimension that could be beneficial for managers to use.

According to Indiatsy et al. (2014), the internet has changed the industry environment and challenged the viability of the five forces model. Indiatsy et al. argued that every industry contains two aspects: the physical part and an informational set. The informational set posed logistical and access challenges before the advent of the internet. However, the internet increased the opportunities related to the informational set and the ability to communicate with consumers (Holm et al., 1996). The result is the need for businesses to seek out collaborators and to maintain innovation by harnessing the

communication power of information technologies like the internet and smart cellular telephones while also protecting against the five forces (Bensecilas et al., 2016; Karagiannopoulos et al., 2005). Flower (2004) criticized Porter's model because of the model's missing attention to digitalization, globalization, and deregulation. These three factors changed the structures of many industries from 2004 to 2014 (Dälken, 2014). The five forces model does not provide guidance to assess a company's resources and capabilities, which are also relevant for analyzing the overall profitability (Rivard et al., 2006). Porter's five forces model has drawbacks, but it also provides valuable information for business owners to create competitive strategies for this study.

### **Small Businesses in the United States**

Small businesses are essential to the United States. According to the SBA (2019c), a small business is a business with a maximum of 250 employees. A small business operates with a range of \$750,000 to \$38.5 million in average annual receipts (SBA, 2019c). Small businesses tend to be privately owned and to operate as corporations, partnerships, or sole proprietorships with less revenue than larger businesses. Also, SBA (2016a) defined a U.S. small business concern as (a) organized for profit; (b) operating a place of business in the United States; (c) operating primarily within the country or contributing to the economy by paying taxes or using U.S. products, materials, or labor; (d) independently owned and operated; and (e) not a dominant business at the national level.

Certain government programs, such as SBA (2019a) loan programs and contracting opportunities, are reserved for small businesses. Businesses must satisfy

SBA's definition of a small business concern, along with the size standards for small businesses. No one true definition of small business exists because business descriptions can be broken down by industry codes according to the SBA's (2019c) specific size standards for hundreds of industries' niches.

### ***Small Business Failure Rate***

Small businesses can have problems staying sustainable in the marketplace. Small businesses have a greater likelihood of failure in uncertain environments involving aggressive business competition (Olaison & Sørensen, 2014). Four out of five (79.8%) small businesses that started in 2016 survived until 2017. An average of 78.6% of new small businesses survived for 1 year between 2005 and 2017 (SBA, 2018). About half of all small businesses operate for 5 or more years. From 2005 to 2017, the small business survival rate ranged from a low of 45.4% for businesses that began in 2006 and a high of 51.0% for businesses that opened their doors in 2011 (SBA, 2018). About one third of establishments survive for 10 years or longer (SBA, 2018). According to Shepherd (2003), business failure occurs when falling revenues and rising expenses occur at such a magnitude that the company becomes insolvent and is unable to attract new debt or equity funding. Unfortunately, the business cannot continue to operate under the current ownership and management and fails.

Researchers have highlighted several reasons why small businesses fail (Desjardins, 2017; Kambwale et al., 2015). Some reasons include poor planning, poor management skills, regulatory restrictions, a lack of access to necessary funding, and a lack of training for success in the business (Kambwale et al., 2015). Desjardins (2017)

identified other complex reasons why businesses fail. First, 82% of new businesses experience cash flow problems while 29% run out of cash completely (Desjardins, 2017). Opening a business without a sufficient demand in the market for the service or product leads to failure for 42% of small businesses. For 23% of failed businesses, they did not have the right team, and 19% of failed businesses were out-competed by other businesses in their industries or localities (Desjardins, 2017). These complex reasons suggest most small businesses fail because their plans are sales-oriented rather than focused on their target customers' needs. Additionally, many small businesses may lack the necessary management training that causes them not to plan thoroughly, which in turn leads to their business failing (Kambwale et al., 2015).

Failure involves social and psychological, emotional, and financial costs (Shepherd et al., 2009; Ucbasaran et al., 2013). The results of failure largely depend on owners and managers' strategic actions (De Jong & Marsili, 2015; DeTienne et al., 2008). Business owners engaging in excessive risk-taking or competitive aggressiveness have an increased probability of failure (Lechner & Gudmundsson, 2014). Business owners' competitive strategy practices can help a business fail or succeed.

### ***Importance and Characteristics of Small Businesses***

The backbone of the national economy exists because of the small businesses that employ under 500 employees that create jobs and markets for consumers (Edwards, 2018; Pham et al., 2018). According to the SBA (2016b), small businesses account for 99.7% of U.S. companies with employees, 48% of private-sector employees, and over 63% of net new jobs from 1992 to 2013. Approximately 60% to 80% of small businesses

ensure the nation has sustainable job growth because of their advantages that ensure flexible management structures enable business leaders to adapt and compete in constantly changing business markets (Classen et al., 2014). Small businesses are critical sources of much-needed jobs, innovation, products, and services both locally and nationally (Edwards, 2018). As a major economic source for the U.S. economy and pathway for owners to achieve financial independence, it is imperative to keep small businesses thriving. Since 1995, small businesses have created 2 out of every 3 net new jobs for the U.S. economy (Pham et al., 2018).

Due to their role in local development, job creation, and innovation diffusion, governments see small to medium businesses as effective agents for poverty alleviation (North & Varvakis, 2016). Small businesses account for 44% of U.S. economic activity (SBA, 2019a). The U.S. government acknowledged that small businesses lack access to the necessary capital to maintain and operate by establishing the SBA. The SBA oversees several programs to support small businesses, including loan guarantees and venture capital programs to enhance small businesses' access to capital. They also have contracting programs to increase small business opportunities in federal contracting; direct loan programs for businesses, homeowners, and renters to assist their recovery from natural disasters; and small business management and technical assistance training programs to help business formation and expansion (Congressional Research Service, 2019). Congressional interest in these programs, and the SBA's assistance provided to small business start-ups, in particular, has increased in 2019, primarily because these

programs are viewed by many as a means to stimulate economic activity and create jobs (Congressional Research Service, 2019).

Small businesses have an essential position in the economy and society since they represent the nation's social structure and influence social change at local and national levels (Barkhatov et al., 2016). Small businesses often focus on customers and understand community needs (Brown, 2018). Consumers who patronize local small businesses put money back to their local communities (Brown, 2018). According to Brown (2018), a thriving local business generates higher revenue levels, which means that the business pays higher taxes, including local property taxes. Small business tax money is used for local police and fire departments and schools (Brown, 2018). Brown also stated a thriving small business could improve the property values within a community, improve every homeowner's bottom line by ensuring businesses rather than residents generate more property and sales taxes that benefit local governments. Life for small businesses is hard, more so in some nations than in others, but what is important to underline is those small businesses created the middle-class base (Barkhatov et al., 2016). Consequently, it is the middle class that resolves the problems of small business failure, setting into motion the growth of the economy through consumption and lead to an increased demand for goods that generates new market segments for new small businesses (Barkhatov et al., 2016). Small businesses have an important impact on the U.S. economy at a national level, but specifically are the core of commerce for local smaller communities.



### *Small Business in Texas*

Small businesses in Texas have expanded in recent years due to its population growth. Texas is the second most populated in the United States (Pickett et al., 2017; U.S. Census Bureau, 2021). Texas had strong population growth in the second decade of the 21st century (Nasser, 2019). For each year between 2010 and 2016, Texas had the United States' largest annual population growth (Nasser, 2019). The state's population growth happened because of a robust and balanced combination of natural increases and net migration from other states that ensured the state's population achieved over 29 million residents in 2020 (U.S. Census Bureau, 2021).

Texas offers one of the nation's best business ecosystems (Nasser, 2019). Small businesses thrive in Texas because of the state's excellent geographic location, highly skilled workforce, low tax burden, reasonable cost of living, predictable regulatory environment, and reputation for having a truly business-friendly climate (Texas Economic Development, 2019). In Texas, 2.7 million small businesses employ 4.7 million people (SBA, 2019b). That figure is more than 45% of Texas' private-sector workforce (SBA, 2019b). Since 2016, Texas's small businesses have created more than 93,022 new jobs (SBA, 2019b). According to Uzialko (2019), Texas boasts a gross domestic product of \$1.77 trillion, representing the second-largest gross domestic product among the 50-state nation. The major metropolitan areas in Texas, like Dallas-Fort Worth, Austin, Houston, and San Antonio, have experienced influxes of residents, which has led to more economic activity (Uzialko, 2019). Increases in start-up companies entering various industries in Texas has supported the robust growth of small businesses

spurred by the increasing number of new residents who generate demand for goods and services (Uzialko, 2019).

### **Marketing in Small Businesses**

Marketing was described by the American Marketing Association (2017) as “the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large” (para. 2). Small business owners approach brand management, network building, loyalty, and customer relationships with caution because of their resource constraints (Mitchell et al., 2015). Small businesses seek opportunities to accomplish their myriad tasks in novel, creative ways and at limited costs due to limited access to time and financing (Turner & Endres, 2017). Therefore, social media platforms have represented important channels for small business advertising, promotion, and consumer recruitment activities and for ongoing communication between employees, customers, and network partners (Schaupp & Bélanger, 2014). Resource constraints increase the need for small businesses to use low-cost marketing resources, such as social media marketing on platforms that include WhatsApp, Facebook, and Instagram (Lupo, 2018). Social media marketing serves small businesses at a great value for a low cost.

### ***Social Media***

Various definitions define social media. According to the Television Bureau of Advertising, Inc. (2019), social media is an entity that consists of online technologies, practices, or communities that people use to generate content and share opinions, insights, experiences, and perspectives. Many small- and medium-sized businesses

understand mobile technology's importance in increasing customer-business interactions (Franklin, 2014). Social media provide an online platform for businesses to market their products and services and to manage customer relationships (He et al., 2017). Small business owners access social media not only with potential, current, and former customers but also with network partners and their competitors. Social media provide cost-effective connections (Lupo, 2018).

Social media networks are gateways for companies to profit and grow in any industry (Shabbir et al., 2016). Small businesses have been increasingly eager to use social media for promoting and growing their businesses, particularly for ensuring the effectiveness of their communication, marketing, and recruitment strategies (Shabbir et al., 2016). Social networking occurs as a daily practice in most consumers' lives (Shabbir et al., 2016). According to Sajid (2016), social media is the next promotion trend. Social media promotion uses social systems, social systems, weblog promotion, and more. Social media applications like Facebook, Google, Instagram, TikTok, Twitter, WhatsApp, and YouTube represent how the social media industry provides small companies with the newest customer networking and customer relationship management (CRM) opportunities (Assimakopoulos et al., 2017). Facebook revealed in its first-quarter earnings announcement in 2016 that it achieved 1.65 billion monthly active users and 1.51 billion mobile users (Facebook Investor Relations, 2016). Facebook reported having 1.09 billion daily active users and 989 million mobile daily active users (Protalinski, 2016). Facebook and YouTube represent the top two websites for attracting the most

visitors worldwide, with Facebook responsible for 40% of all referral traffic, surpassing even Google (Assimakopoulos et al., 2017).

Social media influences business performance via the four channels of social capital, social marketing, revealed preferences, and social corporate networking (Paniagua & Sapena, 2014). Each channel guides a set of social media resources that affect the business performance domain (Paniagua & Sapena, 2014). First, social capital affects the business identity and reputation that influences the resources available to the small business in its personal and business networks (Shanmugam et al., 2019). Company leaders use social capital to provide an effective network by building between individuals within groups, bonding between individuals within groups, and linking others with differential power status to exchange knowledge (Shanmugam et al., 2019; Woolcock, 2001).

Second, social marketing happens by applying commercial marketing technologies to the analysis, planning, execution, and evaluation of programs designed to influence target audiences' voluntary behavior to improve their welfare and society in which they are apart (Hasan & Sheikh, 2018). Social marketing is effective when it generates revenue. Third, the revealed preferences channel represents the extent to which the business's use of social media exposes what customers prefer to buy (Paniagua & Sapena, 2014). Conversation and information sharing lead to opportunities to learn customers' preferences in order to offer products and services they want to buy or acquire (Paniagua & Sapena, 2014).

Fourth, social corporate networking refers to the applications that target professional relationships, such as LinkedIn and ResearchGate (Paniagua & Sapena, 2014). Quinton and Wilson (2016) studied the effect of corporate networking on professional networking sites and showed that LinkedIn enhances business performance. Companies increasingly rely on corporate social networking applications to enhance interactions, increase the density of connections, find qualified candidates for vacant or unfilled positions, and share information that drives business value among coworkers (Boughzala, 2016). The considerable social media platforms and channels offer many opportunities to promote and market small businesses.

### ***E-Business and Information Technology Marketing Strategies***

Small businesses use e-business and information technology marketing strategies to expand their business operations. E-business is the integral practice of planning actions to address the market with strategy and tactics to use online e-business tools to achieve goals aligned with the business's mission and vision, all of which transfer a value proposition to the customer with performance and profitability monitoring (Trejo, 2017). This concept requires tools, such as e-media (e.g., internet cloud, mobile, etc.), e-marketing (e.g., promotion of products and services, capture and retention of the customer, etc.), and e-commerce (transaction of products or services with payment) to be applied in different types of businesses (Trejo, 2017). From a business strategy perspective, e-business encompasses business partnerships, e-learning, CRM, and electronic transactions with customers, vendors, and organizations (Boundless, 2020).

E-business constitutes a critical set of strategic actions that organizations intend to take to ensure their long-term goals and objectives and identify their related priorities (Tsironis et al., 2017). Front-end and back-end integration build on common internet technologies in use (intranet, website, and extranet). They are important antecedents of e-business since they enable communications, collaboration, and the automation of business processes (Soto-Acosta et al., 2016). E-business is itself an innovation (Trejo, 2017).

Information technology provides ready-to-use, end-to-end solutions, and small business owners use information technology to focus on their core business (Ramaswamy, 2019). According to Ramaswamy (2019), digital technology innovations can play a significant role in spurring small business growth. Access to information affects small business owners' decision-making processes because they valid information to make good, competitive decisions (Modimogale & Kroeze, 2011). The survival of small businesses in an increasingly competitive global environment depends largely upon their owners' capacities to leverage information as a resource (Ramaswamy, 2019). Small business owners use information and communication technology to improve the efficiency and effectiveness of their business operations, which can bolster competitive advantage (Qosasi et al., 2019). E-business and information technology strategies help businesses become more structured to make intelligent decisions to remains sustainable in the marketplace.

### ***Technology Positive and Negative Impact on Small Business***

Technology's impact on small businesses can be positive and negative. Olson (2017) explained that the exponential rate at which technology is developing is astonishing, and technology has changed small businesses' marketing and communication abilities. Olson suggested that researchers needed to refer to 2012 to understand how much technology has changed. In 2012, social media platforms struggled to participate in promoting consumer needs. Next, consumers relied on mobile phones for casual communications rather than for completing work. Finally, small businesses did not use cloud-based solutions in 2012 on any noticeable scale.

Technology has affected most aspects of how business is conducted, even decision-making processes (Gartenstein, 2018; Morrison-Smith & Ruiz, 2020). Technology has had a positive impact on business, but some authors have identified the drawbacks technology has placed on business (Papiewski, 2018). Gartenstein (2018) explained that technology has depersonalized communication between coworkers, reduced face-to-face interactions, and increased the likelihood of workers having a false sense of knowledge. Thus, technology has decreased business relationships even as technology has presented businesses with the opportunity to conduct meetings without being physically present in the workplace (Morrison-Smith & Ruiz, 2020). Morrison-Smith and Ruiz (2020) also noted that technology could affect employee morale; when organizations install monitoring software, employees express the belief that their employers do not trust them. Employees need to be trained to use their organizations' information systems both at inception and after upgrades (Papiewski, 2018). Gartenstein

added that dependence on technology is costly due to perennial needs for upgrades and maintenance.

### ***Brand Marketing***

Brand marketing is a marketing strategy that helps small businesses promote their business identities to their consumers. Branding is one of the successful marketing science concepts (Anees-ur-Rehman et al., 2018). If small and medium businesses want to survive and achieve sustainable development, they must spend time and money on brand building, implementing brand marketing, and enhancing brand value (Essamri et al., 2019). Brand building creates brand awareness as a necessary marketing tool for small business leaders to create sustainable businesses (Asamoah, 2014). The owner-manager personality is key to any marketing implementation and intrinsic to small and medium enterprises (Resnick et al., 2016). Brand management plays an important role in organizations, especially in small businesses. It usually has a positive and significant effect on consumers' behavior and innovation activities (Hakim, 2011).

One of those innovative branding management activities is word-of-mouth marketing. Biedenbach et al. (2015) indicated that word-of-mouth information could affect businesses' consumer-based relationships. Small businesses often rely on word-of-mouth recommendations for new customers (Srinivasan et al., 2016). Word-of-mouth marketing provides small businesses with an opportunity to give customers a reason to talk about products, making it easier for word-of-mouth to take place (Srinivasan et al., 2016). Small businesses gain an advantage because they can more easily interact directly with their customers to receive valuable feedback (Gilmore et al., 1999).



Small businesses should define the strengths in the relationships with both buyers and suppliers to discover what aspects of those relationships contribute to having high-quality relationships (Biedenbach et al., 2015). Word-of-mouth feedback about products and services, as well as enthusiasm and recommendations about consumer transactions from consumers, are important to building trust and relationships between small businesses and consumers (Pai, 2017). When consumers, buyers, and suppliers express contentment and trust in their transactions with a business, they remain loyal and recommend the business to others in their social and professional networks through word-of-mouth marketing (Biedenbach et al., 2015). Small businesses can then take advantage of these marketing opportunities that networking and word-of-mouth marketing provide (Srinivasan et al., 2016). With brand marketing, small businesses can connect and network with other businesses that may fit their internal needs to obtain profitability.

### **Consumer Relationship Management for Small Businesses**

Customer loyalty has an important role in an organization. Maintaining customer relationships means improving financial performance and organizational survival, which is why an organization attracts and retains customers (Auliana et al., 2019).

Organizations can create customer loyalty through the use of CRM. CRM is a discipline to identify, attract, and retain the organization's most valuable customers (Auliana et al., 2019). CRM can help managers improve profits by implementing customer-focused strategies.

### *History of CRM*

Small businesses can use customer relationship management strategies to build a reliable customer base. There is no unified definition of CRM, and researchers define it from different perspectives (Chen, 2016). For example, from a business strategy perspective, CRM is defined as the strategic process of selecting the customers that the business can most profitably serve and of shaping the interactions happening between the company and these customers (Kumar & Reinartz, 2016). In addition to business strategy, the technology perspective is often considered a strategy that started taking effect in the 1990s (Chen, 2016).

Starting in the early 1990s, CRM was a marketer's term for "a group of ideas and technologies created to help improve customer-related business practices" (Bligh & Turk, 2004, pp. 7-8). It certainly was the logical extension of companies' long-term efforts to keep up with ever-changing buyers, markets, and competitors. The use of personal computers influenced the growth of the internet as a tool for businesses in the 1990s, as Bligh and Turk (2004) noted. The advent of smart cellular phones magnified the need for businesses to overcome technology challenges in the 2010s (Olson, 2017). CRM via technology created pressure on small businesses seeking to meet customers' needs and expectations (Bligh & Turk, 2004). Successful businesses integrate CRM and technology for marketing, making sales, and providing customer service (Bligh & Turk, 2004). Accordingly, CRM as a core business strategy allows the business to integrate its internal processes and tasks with its external networks in the effort to deliver differentiated value to its target audience and to make a profit (Buttle & Maklan, 2019). CRM is grounded in

collecting high-quality customer-related data through information technology (Buttle & Maklan, 2019).

### ***Operational CRM***

Business owners use operational CRM to establish business functionality and generate the appeal of their business to their customers. According to Paliouras and Siakas (2017), operational CRM focuses on the customer and includes business processes, such as services, marketing, and sales. Operational CRM involves the business engaging in direct interactions, whether face-to-face, by telephone, or through websites, with their customers (Paliouras & Siakas, 2017). The purpose of an operational CRM is to enable transactions with the customer; however, at the same time, strategic use of CRM generates a wealth of analytical data (Yerpude & Singhal, 2018).

Operational CRM generates enormous data augmented with the market intelligence data coming through different channels (Yerpude & Singhal, 2018). The data is gathered into a single database retrieved to derive meaningful business analytics (Yerpude & Singhal, 2018). The operational CRM approach offers the advantage of easily facilitating various communications across multiple channels in the business environment. Employees also can easily access, view, and use customer information for meeting customers' needs (Rahimi et al., 2018). This type of channel integration is crucial for operational CRM, as it brings together customer inquiries, reservation fulfillment, order fulfillment, and small business-customer interaction (Rahimi et al., 2018).

### ***Analytical CRM***

Business owners use analytical CRM to understand their customers and serve them. According to Amnur (2017), analytical CRM builds on customer information. Analytical CRM is a management tool. Analytical CRM accumulates data about customers, data history of small business customer service, and interaction with small businesses that can analyze data from different perspectives (Girchenko et al., 2017). The main objective of analytical CRM is to deliver the relevant information to the desired customers and extract knowledge for optimizing the customer relationship by doing data analysis (Agrawal, 2019). Owners use analytical CRM to detect patterns in customers' behaviors and make conclusions about the causes of customer relationship disruption (Girchenko et al., 2017). Based on the causes of customer relationship disruption, small business owners can review the consequences of not addressing the CRM issues and make decisions to adjust their deliveries of products or services by adjusting their sales processes, marketing strategies, and communication channels (Girchenko et al., 2017). The analytical type of CRM might form a quantified infrastructure for strategic decision making (Rahimi et al., 2018).

### ***Collaborative CRM***

Business owners use collaborative CRM to receive feedback from their customers and determine how they can better serve customers. Collaborative CRM is the communication method with every customer providing proper feedback and the business engaging in appropriate reporting on that feedback (Maheshwari & Kushwah, 2019). Both messages sent to customers, such as straight marketing, web pages, email, and

automatic voice response, and inbound communication from customers, such as voice mail and email, represent opportunities for collaborative CRM (Butler & Carignan, 2017). Customers are more likely to continue using the company if collaborative CRM is in place. Collaborative CRM also enables the respective business to operate in a straightforward manner with its customers (Butler & Carignan, 2017).

Collaborative CRM involves applying systems that empower customers to access services independently through a variety of communication and interactive channels (Munaiah & Krishnamohan, 2017). Collaborative CRM brings people, processes, and data together by channeling data and information appropriately for proactive decision making and enhancing the ability to provide knowledgeable customer service and support activities (Munaiah & Krishnamohan, 2017). A collaborative CRM also includes software used to provide real-time access to information about a company, its suppliers, its development, and any other information offered to third parties interested in contracting products or services from that company (Iršič, 2017). Collaborative CRM is used to manage all types of interactions between an organization and its customers (Rahimi et al., 2018). Collaborative CRM provides information sharing to all stakeholders promptly and includes the customer as a creator of service (Munaiah & Krishnamohan, 2017).

### **Views Related to Previous Research and Findings**

Survival depends on leaders' ability to develop and improve their competitive strategies. Competition is the driving force behind all business, and the market influences

how the company perseveres and grows (Król, 2018). Owners with achievable strategic visions can appropriately sustain their positions in the market's long-term (Król, 2018).

The literature findings indicated that owners should focus on staying sustainable through using competitive advantages in their given marketplace. The efficient strategy use of resources and operations effectiveness is essential for small companies to compete in the marketplace (Ibrahim et al., 2018). In the 2020 competitive business environment, organizations must map out their plans to sustain their business performance, competitive advantage, and profitability (David, 2019). Porter's (1985) generic competitive strategies are price/low-cost leadership, differentiation, and focus/niche strategy. Porter's generic competitive strategies create favorable competitive positioning in any industry and are the fundamental arena in competition. Porter's generic strategies' intentions are establishing a profitable and sustainable position against the forces determining industry competition (David, 2019). Competitive strategies involve identifying sources of competition, then developing strategies that match organizational capabilities to the changes in the environment. Competitiveness is a product of the tactics used by a business for attracting and sustaining relationships with customers, withstanding competitive pressures, and improving its market position (David, 2019; A. Thompson & Strickland, 2010).

The literature indicated that the business environment contains the five competitive forces Porter (1980, 2008) concluded must be analyzed by any small business: (a) entry barriers, (b) supplier power, (c) buyer power, (d) threat of substitutes, and (e) competitive rivalry. Porter's five forces serve as a tool for analyzing competitors

in any industry or field. Porter's five forces determine the competitive intensity in the market, the industry's attractiveness, and the profitability of the business within that competitive market (Porter, 1979). Porter's fundamental premise was that business owners need to differentiate their businesses from others in their industry. Businesses that fail to choose a strategy in at least one of these dimensions operate from a poor strategic position and are unlikely to achieve and maintain profitability (Porter, 1980).

The literature also revealed the innovation of technology integrated with marketing helps small businesses remain sustainable. Information technology advancements have benefitted small businesses to be competitive and successful with e-business marketing (Sanaei & Sobhani, 2018). According to Ramaswamy (2019), technology can create new or modified business practices rapidly, and successful adoption of new best practices must stand up to market forces. Technology and the marketplace are continually reshaping business activities and, as a consequence, business strategies (Ramaswamy, 2019). A small business must continually work towards an alignment that fits into its business strategy and information technology strategy (Ramaswamy, 2019).

The literature indicated digital marketing influences small businesses' use of social media. According to Ritz et al. (2019), digital channels have transformed the way marketers communicate with consumers in 2019. A considerable portion of the world's consumers owns and use computers and mobile devices, contributing to the tremendous growth of digital ad spending (Ritz et al., 2019). Marketers quickly recognized the benefits of social networks such as Facebook, YouTube, Twitter, Instagram, Snapchat,

Pinterest, and LinkedIn for communications. Businesses spent \$51.3 billion on global social network advertising in 2017, a 55.4% increase from 2016 (Cooper, 2019). Small businesses likely would benefit from developing and participating in a digital marketing strategy. The lack of a digital marketing strategy broadens the performance gap between large and small businesses because of reduced opportunities to reach target markets and stimulate sales growth for stability (Ritz et al., 2019).

### **Transition**

Section 1 consisted of an overview of the study that included the problem statement, the problem statement, and the purpose. In Section 1, I explained my reasoning for using the qualitative method as my research methodology choice and the multiple case study as my research design. Section 1 also consisted of research questions, interview questions, and definitions of terms, along with discussions of the study's conceptual framework and assumptions. I concluded Section 1 with a comprehensive academic and professional literature review. The literature review consisted of articles relevant to the sustainable small business topic, including theories and strategies that can help a small business reduce failure rates.

Section 2 begins with restating the study's purpose and discussing my role as the principal researcher. I provide a detailed description of the target population, study participants, methodology for the study, and research design. I address processes for conducting an ethical study and explain data collection instruments, data collection techniques, and data organization techniques. Section 2 also includes detailed dialogue on reliability and validity.



Section 3 includes the study's purpose, the study results, a detailed commentary of the evidence, and combines the research question's conceptual framework and supports the study conclusions. I also present a detailed account of the findings and discuss the findings' applicability to professional business practice. Section 3 contains discussions of (a) implications for social change, (b) recommendations for action, and (c) recommendations for further study. I conclude Section 3 by reflecting on my research process and end the study with my conclusions.

## Section 2: The Project

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore competitive strategies small business owners use to sustain their businesses beyond 5 years. This study's targeted population included three small business owners and managers of restaurants in a large metropolitan city in Texas, who have created successful strategies to remain competitive and profitable for at least 5 years. The implications for positive social change include employment opportunities, community impact such as local school funding, low poverty rates, increase community development from business innovation, and increasing small businesses' growth potential.

### **Role of the Researcher**

I served as the primary instrument for data collection by recruiting potential participants; conducting face-to-face, telephone, or videoconference interviews with the study participants; and gathering data by audio recording and taking notes from the participants' interviews. I was also responsible for selecting the proper research design and methodology as well as identifying any differences and similarities in the data. I have a personal relationship with the topic of small business sustainability from owning a small business in 2014 through 2017 in the retail shoe industry. My experience as a small business owner was one of many challenges. My small business did not survive past 3 years, which is well short of the 5-year benchmark in this study. By conducting this study, I wanted to understand strategic methods used in my small business industry for

other small business owners that may find their business struggling to remain sustainable beyond 5 years.

One of my roles as a researcher required that I build relationships with my participants so they felt comfortable providing their thoughts and feelings about the research topic. The researcher's role in qualitative research is to attempt to access the thoughts and feelings of study participants (Sutton & Austin, 2015). Building strong relationships with the participants is important because they have to discuss things that may be personal to them. My role as a researcher included building trust with the participants, thereby maximizing the benefits of participating in the study and minimizing potential perceptions of harm according to guidance provided by the National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research (1979) in *The Belmont Report*. As a researcher, I ensured that the participants received ethical treatment throughout all phases of the research process. Ethical treatment included respecting the participants' decisions, protecting them from harm, and making efforts to secure their well-being (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979). My role as a researcher also involved being the only person with access to identifiable information from the participants.

According to P. Fusch et al. (2018), qualitative researchers can bring their biases to the research and share their biases with the reader. Researchers need to mitigate their personal biases to ensure that they are correctly interpreting the participant. My role as a researcher included mitigating biases; I sought to minimize biases and errors by using

two different strategies to ensure my study's trustworthiness. First, I employed the strategy of triangulation. According to Long and Johnson (2000), triangulation involves using at least two related data sources, data collection methods, or researchers to reduce inherent biases associated with a single source, method, or researcher. In qualitative research, triangulation adds depth to the collected data (P. Fusch et al., 2018). The second strategy I used was self-description and self-reflexivity. Self-description and self-reflexivity are important in qualitative research to acknowledge and reduce researcher bias. Self-reflection enables qualitative researchers to discuss their position within the study and how their personal beliefs and past training have influenced the research findings (Hammersley & Atkinson, 1996; Long & Johnson, 2000). Self-description promotes credibility and conformability of research findings (Hadi & Closs, 2016). Researchers should make field notes and maintain a reflective journal to recognize and make explicit personal biases (Hammersley & Atkinson, 1996).

The best way for me to connect with participants was through conducting interviews for this study. Researchers use the qualitative research interview to describe the meanings of central themes in the participants' lives (Moser & Korstjens, 2018). The main task the interviewer performs is understanding the meaning of the information participants provide (Moser et al., 2010). Interviews are a data collection method in which an interviewer asks the respondents questions, whether face-to-face, on the telephone, or online (Bonevski et al., 2014). Internet-based technologies, including Zoom, Skype, Google Hangouts, and FaceTime, provide the means for interviewing the research participants virtually via a live connection (Lo Iacono et al., 2016). Rather than

doing empirical analysis of numbers through surveys, I conducted videoconference interviews so I could observe the participants' nonverbal communication as I asked them questions. I bore the responsibility for transcribing each interview, analyzing the collected data, and compiling the results. I followed the interview protocol (see Appendix) to ensure my interviewing process was transparent and the same for each participant. My role as a researcher included making sure the interviewing process was conducted fairly and equally for each participant, so I would not miss any important information needed for fulfilling this study's purpose.

### **Participants**

The eligibility criteria for the study participants were people in the targeted population who (a) owned a small business in a large metropolitan city in Texas beyond 5 years; (b) were above the age of 18; and (c) had fewer than 500 employees. Researchers use eligibility criteria to select experienced participants who can furnish relevant and valuable data (Latiffi et al., 2016; Sowman et al., 2014). The study's participants comprised three small business restaurant owners located in a large metropolitan city in Texas.

Researchers select sample members purposefully based on the study's information needs (Beck, 2010). To gain access to participants for this study, I contacted potential participants by relying on colleagues' referrals. After receiving approval to conduct the study from Walden University's Institutional Review Board, I used the internet and social networking sites, such as LinkedIn, to direct message or email business owners of at least ten small businesses in a large metropolitan city in Texas, to

request their participation. In the email, the small business owners were introduced to my research and its purpose. I also made follow-up phone calls to explain the research and ask for participation. The participants were informed that I would ensure their participation occurred with confidentiality and that they could withdraw from the study at any time, before, during, or after the interview.

The small business owners who agreed to participate in the study received a consent form through email and replied to that same email with their consent to participate. Before conducting a research study, researchers must ensure that the participants agree to participate (Lynn, 2014). I selected three business owners and interviewed them via video conference through an internet conferencing application. I worked with the three participants' schedules to see what dates and times they were available. Communication through email is helpful for scheduling interviews and clarification purposes (Al-Alwani, 2015; Lenters et al., 2014). However, using email did not guarantee I had the best means to recruit interview participants to the study (see Al-Alwani, 2015; Lenters et al., 2014). Hence, I gave the participants an internet option to interview through a conferencing application on the agreed day and time.

Relationships built with rapport and trust between research participants and researchers are necessary to conduct research successfully (Guillemin et al., 2018). Research participants often begin the research interview relationship with researchers whom they may not know but whom they need to trust (National Health and Medical Research Council, 2015). For my study to be a success and have valid findings, I needed to build an honest and trustful working relationship with the participants. Importantly, I

had already built great relationships and professional networks with small business owners in the Texas area during my short time as a business owner. With my health insurance career, I also created a reputation of trustworthiness in my professional network. I used my experience alongside my professional and personal relationships with Texas area small business owners to connect with the participants during the recruitment process and their interviews. I gained their trust by being respectful, honest, and personable, which are all attributes for which I have a reputation. This trust helped obtain valuable information from the participants during the data collection stage.

### **Research Method and Design**

Qualitative, quantitative, and mixed are the three standard research methods (Gill, 2014; Makrakis & Kostoulas-Makrakis, 2016; Mukhopadhyay & Gupta, 2014). This study involved exploring a phenomenon and presenting data through participants' lived experiences. I researched and explored different aspects of my participants' perspectives to determine their interactions with their business environments. A qualitative research method was used in this study to understand the strategies of small business owners who have survived beyond 5 years of successful operation.

### **Research Method**

A qualitative method is a valuable tool in research with which researchers seek to answer complicated questions involving the how and why aspects of small business success or failure (Hamilton & Finley, 2019; Kaae & Traulsen, 2015). The strengths of qualitative research are theory elaboration and generation rather than theory testing (Reinecke et al., 2016). Qualitative research is valuable for exploring novel or new

business ethics questions, where no or little extant theory exists from which to deduce testable research hypotheses (Reinecke et al., 2016; van den Berg & Struwig, 2017). As qualitative research typically proceeds inductively from data to theory, the researcher can use the qualitative method to explore domains and questions that quantitative research would struggle to formulate hypotheses about or find sufficient data on (Reinecke et al., 2016; Smith, 2015). Unlike quantitative and mixed methods, I could use the qualitative method to explore participants' domains to understand the phenomenon of how to create small business strategies to sustain a business longer than 5 years of operation.

Researchers use the quantitative method to focus on objectivity through using measurements and the statistical, mathematical, or numerical analysis of data (Creswell, 2013). The quantitative method is appropriate when there is the possibility of collecting quantifiable measures of variables and inferences from samples of a population (Park & Park, 2016; Queirós et al., 2017). Quantitative research follows structured procedures and formal instruments for data collection, and data are collected objectively and systematically (Brink, 2015; Queirós et al., 2017). There are limitations to the quantitative research method. One limitation is the quantitative method is not useful in ascertaining deeper underlying meanings and explanations (Frels & Onwuegbuzie, 2013; Rahman, 2017). Another limitation of quantitative research is that positivism has no means for addressing how actors shape and maintain their social reality or how people interpret their actions (Blaikie, 2007). Another weakness of the quantitative research approach is that it only offers a snapshot of a phenomenon at a point in time. Subsequently, qualitative researchers disregard whether the phenomenon has already



happened and simply express the results according to the ideal or disarranged conditions affecting the phenomenon's variables at one point in time (Schofield, 2007). In this study, I did not test hypotheses for examining differences or relationships among variables because the study's purpose involved gaining a deeper understanding of the competitive strategies small business owners use to remain sustainable longer than 5 years.

Mixed methods involve collecting and analyzing both qualitative and quantitative data (Johnson et al., 2007; Mabila, 2017). Mixed-methods research enhances knowledge and validity (Schoonenboom & Johnson, 2017). Mixed-method research is the third paradigm between qualitative and quantitative research (Johnson & Onwuegbuzie, 2004; Razali et al., 2016). Since mixed-method research includes quantitative components, the mixed method was not appropriate for this study.

### **Research Design**

The research design represents a general process of conducting qualitative research (Astalin, 2013; Leedy & Ormrod, 2016). Several different qualitative research designs are commonly used, such as phenomenology, ethnography, narrative, and case study (Creswell & Poth, 2017). Researchers use the qualitative method to allow participants not only to tell a story about their experiences but also to provide background information about the cultural beliefs and norms affecting their experiences, such as their small business ownership experiences (Berglund, 2015; Gill, 2014; R. Thompson, 2018). The phenomenological design was not appropriate for this study because I did not intend to research individuals' lived experiences on identifiable issues to develop common themes. The phenomenological research design was not the appropriate choice because I

sought to understand the why and how related to participants functioning in their small business environments.

Ethnography offers researchers the opportunity to describe a culture and to understand the perspective of the person or persons native to the environment (Huo et al., 2014; Sah, 2017; Spradley, 1979). Ethnography is an approach for studying *culture* where culture can be understood as the gained knowledge that people use to research cultural experiences and generate social behavior (Park & Park, 2016; Pritchard, 2011; Spradley, 1979). Ethnography can be used to understand participants' actions and their lived experiences by accessing field settings and observing their activities (Sah, 2017). Conducting an ethnography requires researchers to interject themselves into the group setting and follow the participants for a prolonged period to understand their culture and life (Jerolmack & Khan, 2014; Letourneau, 2015; Reich, 2015). Ethnography was not appropriate for this study because I had no intention of following participants for prolonged periods based on the research questions that directed the conditions of the study. Ultimately, this design did not align with the purpose of this study because my intention was not to study a culture or social behavior within a community.

Narrative inquiry is used to ensure the stories themselves as provided by the participants become the raw data (Bleakley, 2005; Hunt, 2014). In many fields of study, narrative inquiry allows for gaining an in-depth understanding of the identity, culture, historical experiences, and lifestyle of the participant (Butina, 2015; Lieblich et al., 1998). The narrative inquiry approach involves directed the inquiry toward the human experience as expressed in a narrative format (De Vries, 2018; Hoshmand, 2005).

Narrative inquiry design was not appropriate for this study because I did not gather participants' stories to learn about their identity or lifestyle.

The qualitative research design most appropriate for exploring the competitive strategies small business owners in the restaurant industry use to sustain their businesses beyond 5 years was a multiple case study design. Stake (1995) defined the case study research design as involving data collection with single or collective cases investigating and analyzing the complexity of the object of study. Yin (2012, 2018) defined case study research design as an in-depth practical investigation of a current event in the actual context. In the case of studies, investigators adopt the research design to understand a real-life phenomenon under natural conditions relevant to the occurrence under investigation (Hyett et al., 2014; Thomas, 2011). This study involved exploring real-life decisions regarding competitive strategies of small business owners. In qualitative research methodology, the case study was a significant qualitative strategy (Denzin & Lincoln, 2011; Hallberg, 2013; Merriam, 2009; Meyer, 2001; Morse, 2011). The case study research method differs from other research designs because the focus of the research occurs within a bounded system or case that represents the unit of analysis (Hyett et al., 2014; Rosenberg & Yates, 2007). According to Hyett et al. (2014), the case study design is a popular approach among qualitative researchers. The objective of case study research is not statistical, and case study research results are not generalizable to all populations (Hyett et al., 2014).

Researchers have to choose between conducting a single case study or multiple case study to understand a phenomenon (Gustafsson, 2017). A single-case study is when

a researcher wants to study a specific phenomenon arising within a particular entity and gain an in-depth understanding of the single phenomenon (Heale & Twycross, 2018). Using a multiple case research study allows for a more in-depth understanding of each case as a unit of analysis because each case can be compared with the others for similarities and differences embedded within the group of cases (Heale & Twycross, 2018). When case studies are compared to each other, the researcher can use the literature to highlight the contrasts and similarities between the cases (Vannoni, 2015). Evidence created from a multiple case study can be strong and reliable (Baxter & Jack, 2008).

Using a multiple case study design was appropriate for this study because it is flexible to use and could capture a high detail description of insight into small business owners' competitive strategies in a large metropolitan city in Texas, which used to be successful. I collected data until I achieve data saturation. Data saturation occurs when no new data emerges during collection. Sandelowski (2008) referred to saturation as informational redundancy. Data saturation or informational redundancy relates to the degree to which new data repeats itself in previous interviews (Saunders et al., 2018). In interviews, when the researcher begins to hear the same comments repeatedly, data saturation is being reached. Data collection should be stopped at that point, and data analysis started on the data collected (Grady, 1998). For this study, participants were interviewed until saturation was reached. I achieved saturation when I saw the same common themes pattern from different participants.

### **Population and Sampling**

A case study is focused on a bounded unit of study that can be one person or a group of people representing a common bounded setting aiming to generalize over several companies (Gustafsson, 2017). This study involved a purposeful sample of three participants who own successful small restaurant businesses in operation beyond 5 years in a large metropolitan city in Texas. Purposeful sampling is the strategic selection of information-rich cases (Bungay et al., 2016). I gained access to participants through purposive sampling. Typically, qualitative sampling begins with volunteer informants and supplement with additional participants, but many qualitative studies eventually evolve to a purposive sampling strategy (Beck, 2010). Purposive sampling is when researchers handpick the cases or types of cases that best contribute to the information needs of the study (Beck, 2010). The purposive sampling technique, also called judgment sampling, is the participant's deliberate choice due to the qualities the participant possesses (Etikan et al., 2016). Purposive sampling is a nonrandom technique for gaining participants that does not rely on underlying theories or a prescribed number of participants (Etikan et al., 2016). The researcher determines the information that needs to be known and sets out to find participants meeting the selection criteria who are available and willing to provide their knowledge or experience for the research (Bernard, 2018). For this study, participants were interviewed until data saturation was reached. I knew saturation was completed when I saw the same common themes pattern from different participants.

Qualitative studies need to have a large enough sample size to achieve data saturation and answer the research question. I chose three participants for my sample size because I did not risk having large repetitive data that larger sample sizes may have. There is a point of diminishing returns with larger samples, which leads to more data but does not necessarily lead to more information (Shetty, 2020). For this study, I started with three participants to collect meaningful data and planned to add participants as needed until data saturation is achieved. The participants for this study had to meet the criteria of (a) owning a small business in Texas beyond 5 years; (b) being above the age of 18; and (c) employing fewer than 500 employees. The business owner had to be the founding or original owner who started the business. The business owner must have been in operation for at least 5 years. Lastly, the business must have operated from a brick-and-mortar office space and could not operate out of a residential home office.

This study's prospective participants received an invitation to participate through a detailed email message. I made follow-up calls to explain the research and request participation. Participants who agreed to participate in the study received a consent form through email and were asked to reply to that same email with their consent to participate. I conducted each interview in a setting comfortable for the participant and agreed upon before the videoconference interview. Initial interviews took up to 45 minutes to conduct, were audio recorded, and took journal notes.

### **Ethical Research**

According to Grady (2016), when the researcher invites people to participate in research, the potential participants have the power to make a choice based on their

understanding of what the study is about and the risks and benefits of participation.

Before I contacted potential participants, I applied for and received approval from Walden's Institutional Review Board (Approval No. 12-31-20-0656385). For this study to remain ethical for completion, I sent consent forms to all the participants for their acknowledgment, signature, and permission to being in this study. I sent an email to each participant that included the informed consent form, the nature of the study outline, and requested participation. I also included in the consent form email that their participation was voluntary. At any point in the process, they had the right to withdraw from being a participant without penalty or obligation. If a participant sought to withdraw from the study, they reached out to me directly through email or phone. The potential participants could have emailed or called me stating their decision to no longer participate in the study. There was no form of compensation or incentives for participating in the study.

After potential participants agreed to become part of the study, the next step was to ensure the participants are ethically protected. Researchers are responsible for using appropriate methods to ensure the confidentiality and security of field notes, recordings, samples, or other primary data and participants' identities (Barker, 2016). I started by coding each participant by labeling them as participants and assigning them a number (i.e., Participant #1 or Participant #2) instead of using their names or their associated business. I am the only person to have access to the participant's information. I ensured the participants' confidentiality by securing all participant information in a locked filing cabinet or password-protected electronic files for 5 years. After 5 years, I will destroy all paper documents by shredding and all electronic files by permanently deleting the files.

## **Data Collection Instruments**

I was the primary data collection instrument in this qualitative case study.

Guidelines to conduct qualitative research exist as each study is unique. The researcher must decide how to proceed because they are the primary data collection instrument and analysis in qualitative research (Clark & Vealé, 2018). The various data collection methods in qualitative research include observations, textual or visual data (e.g., artifacts, documents, books, or videos), and interviews with individuals or focus groups (Silverman, 2000). I collected data through semistructured, face-to-face interviews or videoconference interviews with three small restaurant business owners who have been operating in a large metropolitan city in Texas, for at least 5 years.

Interviews form the backbone of primary data collection in qualitative research designs (Adhabi & Anozie, 2017). According to Alshenqeeti (2014), the most used type of interview in qualitative research is semistructured interviews. This type of interview also an outline of topics and questions prepared by the researcher (Stuckey, 2013). Unlike structured interviews, semistructured interviews do not require following a strict, formalized structure for questioning participants (Adhabi & Anozie, 2017). I conducted semistructured interviews, reviewed academic literature, and reviewed organizational documents to understand the strategies small business owners use to remain sustainable. I used an interview protocol and interview questions to improve the transparency of this study (see Appendix). I asked participants to provide documentation of their profit and loss (P&L) statements along with their cash flow statements as organizational documents for data collection. One of the main advantages of asking open-ended interview questions



is the participants can offer open and in-depth responses instead of brief affirmative or negative answers (Petrescu et al., 2017). After each semistructured interview, I provided a summary of my interpretations of the participant's responses for feedback to enhance the reliability and validity of the interview.

Interviews form the backbone of primary data collection in qualitative research designs (Adhabi & Anozie, 2017). According to Alshenqeeti (2014), the most used type of interview in qualitative research is semistructured interviews. This type of interview also outlines topics and questions prepared by the researcher (Stuckey, 2013). Unlike structured interviews, semistructured interviews do not have to follow a strict formalized structure for questioning participants (Adhabi & Anozie, 2017). I conducted semistructured interviews, reviewed academic literature, and reviewed organizational documents to understand the strategies small business owners use to remain sustainable. I used an interview protocol and interview questions to improve the transparency of this study (see Appendix). I asked participants to provide documentation of their P&L statements and their cash flow statements as organizational documents for data collection. One of the main advantages of asking open-ended interview questions is the participants can have open responses instead of brief affirmative or negative answers (Petrescu et al., 2017). After each semistructured interview, I provided a summary of my interpretations of the participant's responses for feedback to enhance the reliability and validity of the interview.

Triangulation is an important concept regarding data analysis for an empirical study (G. Fusch et al., 2018). Multiple external analysis methods concerning the same

events and the process's validity can enhance by triangulation (G. Fusch, 2001; P. Fusch & Fusch, 2015; P. Fusch & Ness, 2015; Marshall & Rossman, 2016). Triangulation is important in ensuring the reliability and validity of the data and results (G. Fusch et al., 2018). I triangulated multiple sources of data to enhance this study's validity and reliability. To collect data for triangulation, I conducted interviews asking open-ended questions to participants, observing participants, and reviewing organizational documents.

### **Data Collection Technique**

The data collection techniques used for this study are semistructured interviews and a review of company documents. Researchers use the semistructured interview method to collect data that explore participant's thoughts, feelings, and beliefs about a particular topic (DeJonckheere & Vaughn, 2019). Using semistructured interviews, researchers can delve deeply into personal and sometimes sensitive issues (DeJonckheere & Vaughn, 2019). Semistructured interviews are used for data collection to gather information from the key informants with attitudes, perceptions, beliefs, and personal experiences related to the topic of interest (DeJonckheere & Vaughn, 2019). A semistructured interview has structure, but the researcher has the flexibility to ask follow-up questions to obtain rich data (Kopp et al., 2017; Mori et al., 2018). Researchers use semistructured interviews because they can get in-depth information from their participants and have the flexibility to ask extensive questions that could provide rich data. I followed an interview protocol (see Appendix) to ensure my interviewing process was transparent and equal for each participant.

By conducting videoconference interviews, I planned to gain as much information as possible. Researchers can monitor tone, word choice, and body language changes to gain a deeper understanding with face-to-face interviews (Steber, 2017). An advantage of using video conference interviewing was I could use face-to-face or video conference interviewing to get a deeper understating of the competitive strategies small businesses use by engaging with small business owners in a personal way. Researchers use face-to-face interviews to ensure understanding from the participants and to dig deeper into the interview as needed (Magliano et al., 2018). I had the flexibility to ask follow-up questions to gain insight into small business owners' minds. I also observed the participants' body language to judge how they reacted to specific competitive business strategies. I used face-to-face or video conference interviews to investigate deeper into specific questions to make sure the answers I received from the participants were clear.

There are some disadvantages to using face-to-face or video conference interviews as a data collection technique. One disadvantage is the length of time spent recruiting participants and conducting interviews. Finding participants was time-consuming because not only was I searching for participants, but they also had to be the right fit for this study. In-depth interviews are time-consuming, as interviews must be transcribed, organized, analyzed, and reported (Steber, 2017). Another disadvantage was the time constraints of participants. Participant availability could cause problems with securing interviewing times. The last disadvantage was the long time it took to conduct member checking. Member checking required more time from both the participants and me to ensure the data were accurate by the participants' standards.

### **Data Organization Technique**

Gathering data from participants was necessary for my study, but the management and organization of that data were also critical. While acknowledging the importance of interfacing with the rich and meaningful data, I also prepared to manage and organize in-depth and rich data (Maher et al., 2018). All data were securely stored and protected with procedure measures to ensure the security of the data (Achinewhu-Nworgu et al., 2015). Researchers are responsible for knowing who owns the findings and understanding how data should responsibly be collected, stored, and protected (Steneck, 2004).

I digitally recorded and kept a notebook journal of each interview conducted. The note journal was used within 24 to 48 hours after the initial interview. I transcribed each participant interview and labeled each participant (i.e., Participant 1, 2, 3, etc.) to keep an accurate alignment of participants' statements. The data captured under each participant label was used to connect common themes between interviews. I also protected the personal information of the participants. I secured all raw data, including digital recordings along with interview notes and transcripts, in a lockbox safe in my home and will keep data secure for 5 years, then destroy the data.

### **Data Analysis**

For data analysis of this study, I used the five-step data analysis procedure proposed by Yin (2018): (a) compile a database, (b) disassemble data, (c) reassemble data, (d) interpret data, and (e) conclude. Researchers use the five steps for structuring the data analysis and countering criticisms found in the literature regarding case study methodology as lacking a commonly accepted analytic structure (Cronin, 2014; da Mota

Pedrosa et al., 2012; Harland, 2014). During the first step, I compiled the data to develop common theme groups once I completed data collection. Data compilation included sorting through journal notes collected from interviews to arrange data in a meaningful order and rereading transcribed notes to look for certain keywords used by interviewees to access relevance to original research questions. I then placed the data into a format known as data record that can be used for further research, thus completing the first step of Yin's data analysis procedure.

In the second step, I disassembled the data to filter out nonchanging themes of the phenomenon. I broke down the data compiled during the first step into smaller fragments and assigned a label to each fragment. To categorize each fragment, I identified specific actions, opinions, and explanations from participants to assign Level 1 coding. When I detected similar items from the participants' interviews, I placed them under a broader category and reclassified the similarities with Level 2 coding. During the third step, I reassembled the data and combined core themes. This step was difficult due to the complexities that resulted during the coding process. I avoided repetitive coding of statements and did not code participants' statements that were unrelated to the questions I asked during the interviews.

According to Yin (2018), reassembly of the data entails the use of substantive themes to combine fragmented items into different groups such that the new information is different from the original note. During this stage, I identified patterns by searching for different events or experiences the participants stated in their interview and determined if

the events or experiences were relatable. After identifying credible patterns, I proceeded to the fourth step.

During the fourth step, I checked patterns against interview transcripts, journal notes, and company documents to interpret the meaning of the data. I ensured the data aligned with the research objectives to bringing out important key points. After providing extensive interpretation, I developed a detailed and focused conclusion to complete the fifth step of the data analysis process.

I also used methodological triangulation to strengthen reliable results. Methodological triangulation is a process to look at the data from multiple perspectives and consider a phenomenon in more than one way assists in mitigating the potential to see the data from just one view (Denzin & Lincoln, 2011). A case study design that applies at least two data collection methods represents one example of methodological triangulation (P. Fusch et al., 2018). This study's data sources consisted of academic literature, semistructured interviews, and organizational documentation. From those three sources of data, reoccurring themes were identified. I explored themes among the three forms of data sources to recognize the competitive strategies small business owners in a large metropolitan city in Texas, use to remain sustainable or to increase sustainability beyond 5 years. I used the qualitative analysis method to organize and analyze data for triangulation (Jonsen & Jehn, 2009). Researchers use the qualitative analysis method to organize data that can be easily coded and triangulated (Davidson et al., 2017). Using a Microsoft Excel spreadsheet, I categorized and coded all themes derived from the interview data, company documents, and the literature review. I correlated key themes

with recent studies, the conceptual framework, and data from interviews with participants. Using those three sources of data, I connected the thematic findings with the conceptual framework and related literature.

### **Reliability and Validity**

Reliability and validity are criteria researchers use to strengthen their study. Two important features for evaluating any measurement tool for conducting good research are reliability and validity (Mohajan, 2017). Reliability represents the stability of findings in a qualitative study, and validity represents the findings' truthfulness in a qualitative study (Altheide & Johnson, 1994). Validity and reliability increase transparency and decrease opportunities to insert researcher bias in qualitative research (Singh, 2014). I increased trustworthiness through evaluation methods to establish dependability, credibility, transferability, and confirmability.

#### **Reliability**

I used methodological triangulation and member checking to strengthen the reliability and validity of the study. Methodological triangulation involves applying more than one method when studying a phenomenon. Use of methodological triangulation promotes several data collection methods such as interviews and observations (Bekhet & Zauszniewski, 2012; Noble & Heale, 2019). I analyzed the three data sources to connect themes and triangulate data.

Dependability is the stability of findings over time (Chowdhury, 2015; Lincoln & Guba, 1985; Moon et al., 2016). Dependability is the study's consistency and reliability (Chowdhury, 2015; Lincoln & Guba, 1985; Moon et al., 2016). Member checking is an

effective procedure that involves seeking feedback from the participants about the raw data originally collected from them for ensuring the findings in qualitative research have validity (Arora, 2017). Researchers commonly use member checking in qualitative research. After data were collected, I involved the participants in member checking for commenting on and confirming my data interpretations. I sent out member checking invitation emails to each participant to conduct member checking interviews. Researchers use the member checking process to help determine whether the researcher made correct interpretations about the participant's data (Carlson, 2010; Creswell & Miller, 2000; Lincoln & Guba, 1985). Once I completed interviews with participants, I provided the participants with my interpretations of their responses to ensure I did not include any personal bias. After participants reviewed and confirmed my interpretations, I solidified the themes developed from their interviews.

### **Validity**

I used semistructured interviews, organizational documents, and a review of academic literature for data sources for this study and connected themes that reoccurred to triangulate the data. Using three data sources to connect themes and triangulate data, I increased the credibility of the study. To increase the validity of the study, I reviewed organizational documents along with the participants' interviews. I used member checking to increase the validity and credibility of the research. Through member checking, participants were allowed to participate in the research process and the construction of the research outcomes (Iivari, 2018; Santos et al., 2017). Researchers achieve credibility through qualitative research through reliability, replicability,



consistency, and accuracy of a study's findings (Tracy & Hinrichs, 2017). Triangulation is a key data practice that can enhance credibility (Tracy & Hinrichs, 2017).

I used triangulation between multiple sources of data to improve transferability. To enhance transferability, the researcher must provide sufficient details about settings, inclusion/exclusion criteria, sample characteristics, data collection, and analysis methods so that the reader can evaluate the extent to which the conclusions made by the researchers are transferable to other settings, situations, and populations (Hadi & Closs, 2016). Readers can determine if this study's findings could apply to their small business for competitive strategies to remain sustainable in their industry.

I used methodological triangulation between three data sources to increase the confirmability of the study. Confirmability involves how well a study's findings reflect the respondents' opinions and experiences rather than the researchers' biases, motivations, or interests (Kyngäs et al., 2020). The role of triangulation in promoting confirmability needs emphasis to reduce the researcher's bias effects (Abdalla et al., 2018). Through methodological triangulation, readers can review the quality of the data for confirmability.

All qualitative research's quality criteria are credibility, transferability, dependability, and confirmability (Korstjens & Moser, 2018). When the researcher finds no new information or themes, data saturation has been met (P. Fusch & Ness, 2015). To meet the criteria of having a valid study, the researcher must have data saturation, and the study has to be credible and confirmable. I interviewed three small business owners in a large metropolitan city in Texas, until there was no new data. I achieved data saturation

with three interviews, so I did not need to conduct more interviews to achieve data saturation. After I interviewed the participants, I used member checking to help ensure my interpretations of the participants' responses were correct. I triangulated the three data sources of organizational documents such as P&L spreadsheets, business plans, etc.; academic literature; and interviews with participants to confirm the study's reliability and validity.

### **Transition and Summary**

Section 2 included the purpose of the study topic, the researcher's role, the research method, research design, population and sampling, ethical research, data collection instruments, data collection technique, data organization techniques, data analysis, reliability, and validity of the study. I collected company documents, reviewed academic literature, transcribed interviews, analyzed data, and conducted methodological triangulation.

Section 3 includes the presentation of findings from the data collection and analysis. Section 3 also includes applications to professional practice and implications for social change. Lastly, Section 3 contains recommendations for action and future research, reflections, and the study conclusion.

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

The purpose of this qualitative multiple case study was to explore competitive strategies small business owners use to sustain their businesses beyond 5 years. The study's participants included three small business restaurant owners in a large metropolitan city in Texas, who have created successful strategies to remain competitive and profitable for at least 5 years. The participants selected for this study were experts in their field and acquired knowledge from their extensive background in the restaurant industry. Data were collected from three videoconference, semistructured, participant interviews, the owner's P&L statements, and their cash flow statements. I triangulated the data from these sources to develop themes.

The research question for this study was: What competitive strategies do small business owners use to sustain their businesses beyond the first 5 years of operation? When participants were asked about their competitive strategies to sustain and grow their business performance, the business owners had comparable and relatable responses. Using a five-step data analysis procedure, a review of the literature, and Porter's (1980) competitive advantage theory conceptual framework, I found recurring themes that all participants use to sustain their businesses, including personalizing customer service, hiring talented employees, and operating the business at a low cost.

#### **Presentation of the Findings**

The data collection for this multiple case study included three semistructured interviews with participants that own small restaurant businesses. Due to the COVID-19 pandemic, the participants opted for videoconferencing meetings through a website

meeting tool called Zoom. Participants of this study had (a) owned a small business in a large metropolitan city in Texas, beyond 5 years, (b) were above the age of 18 years old, and (c) had fewer than 500 employees. In the interviews, each participant answered eight open-ended questions about competitive strategies and strategy implementation (see Appendix).

After the interviews were conducted and digitally recorded, I transcribed the audio recordings into Microsoft Word to keep a notebook journal of each interview conducted. The data captured under each participant label identified common themes among interviews. I used methodological triangulation to strengthen reliable results. Academic literature and the participants' organizational documents (i.e., P&L statements and cash flow documents) were reviewed to gather additional information and determine the effectiveness of competitive strategies discussed in interviews. I also used member checking to validate participant interviews.

The conceptual framework that guided this multiple case study was Porter's (1980) competitive advantage theory. Competitive advantage strategy theory, as presented by Porter (1985), is the search for a favorable competitive position in an industry in which competition occurs. According to Porter (1985), the competitive strategy is used to establish a profitable and sustainable position against the forces determining industry competition. The purpose of competitive advantage is to acquire or develop attributes or a combination of attributes that allows businesses to outperform their competitors.

I designed the interview questions for this study to receive responses that would give insight into different competitive strategies small business owners use to remain sustainable in the competitive restaurant industry. The themes that emerged from the data analysis were organized into broader themes to provide competitive strategies used in competitive restaurant markets. The three major themes that emerged were (a) personalizing customer service, (b) hiring talented employees, and (c) operating the business at a low cost. In the following subsections, I discuss each of the emergent themes and explore their alignment with Porter's competitive strategy theory. I also compare the findings to those of existing literature to determine which findings disconfirm, confirm, or extend knowledge on the topic.

### **Theme 1: Personalizing Customer Service**

Providing personalized customer service is one way small businesses can create a competitive advantage against larger-scale competitors. Participants in this study expressed the value of personalized customer service. A key to success and survival for small businesses in a competitive market is building personal customer relationships (Alshurideh, 2016). Small businesses can use customer service relationships to improve profitability by retaining loyal customers (Kumar & Reinartz, 2016). Organizations build CRM into their overall business model to identify, cultivate, and maintain profitable customers (Moenardy et al., 2016). Small businesses establishing personal customer relationships provide services that their larger-scale competition may not offer.

Another valuable factor that contributes to personalized customer service is brand loyalty. Based on the organization documents reviewed in this study, most of the sales of

the three small businesses stem from returning customers who want that personal engagement feeling when they come to a restaurant. If service failures occur, the company response affects consumer trust, affection, and loyalty (Iglesias et al., 2020). Small businesses need to be personal with their service to differentiate themselves from the competition and keep their customer's loyalty for future sales and growth. The three small business owners expressed their thoughts about personal customer service to make a long-standing connection with customers for future sales.

Participant 3 stated,

We all wear ties, and we look unified while we are servicing our customers. That can go a long way with your customers. Can your employees be pleasant and serve without having an attitude? Are we going the extra mile with customer service to remember customers and be personal with them to the point that we know their names or memorize their order? All of these things can go a long way with your customers now and in the future.

Participant 2 stated,

Whether you like it or not, the customer is always right. You have to give them what they want or go somewhere else to get it. Try to make it suitable for the customers most of the time. It helps to have genuine relationships with your customers to the point that you remember their names and order. These small things, I believe, keep customers coming back.

Small businesses put a lot of effort into building a relationship with their customer base. All participants stated that personalizing customer service is a way for them to

remain sustainable in a heavily competitive restaurant market (see Table 1). All participants provided ways they could enhance their customer service experience for more personalized customer service. Participant 1 explained how research and development contribute to personal customer service:

Customer service is hard to master because every customer is different. Even your employees that serve your customers are different. It all comes down to sacrificing your moods and how you personally feel for the greater of the business. You can use research and development for customer service as well. This helps with understanding customer's habits and trends. Something as simple as customer service surveys can help your business gain insight into complaints or gripes about your business.

The personal customer service theme confirmed previous researchers' findings and corroborated the existing body of knowledge on effective business practices. Since the restaurants offer similar products and services, retaining loyal customers is critical in the competitive market (Majid et al., 2018). According to Williams (2017), customer service is essential to a small business because having satisfied customers can make a difference in a company's ability to survive in a competitive environment.

**Table 1***Coding of Participants' Responses Related to Personalizing Customer Service*

Theme	Participants <sup>a</sup>	Responses <sup>b</sup>
Personalizing customer service	3	40

*Note.* <sup>a</sup>Number of owners who answered interview questions. <sup>b</sup>Number of participants' responses linked to the themes.

All three small business participants expressed the importance of personal customer service. They require this level of service from their employees, but as small business owners, they lead the way. All three participants understand the value of customer service to their business and use it as a strategy against their competition. This strategy aligns with the competitive advantage theory of differentiation strategy in which Porter (1980) suggested organizations should differentiate from the competition by providing a different or unique level of service.

### **Theme 2: Hiring Talented Employees**

According to Wintrip (2017), hiring talented employees that do quality work is the secret competitive advantage that makes companies great. Another way to succeed according to Porter's (1980) competitive advantage theory is to use the differentiation strategy to deliver high-quality products and services. The most critical people providing the service and products are the employees; therefore, hiring talented employees becomes essential for small businesses to remain sustainable in a competitive market. All three participants expressed the importance of hiring qualified employees in helping their



business stay sustainable. Table 2 shows how much the participants value hiring talented employees as a competitive strategy.

**Table 2**

*Hiring Talented Employees*

Theme	Participants <sup>a</sup>	Responses <sup>b</sup>
Hiring talented employees	3	27

*Note.* <sup>a</sup>Number of owners who answered interview questions. <sup>b</sup>Number of participants' responses linked to the themes.

Participant 3 stated, "A strategy for sustainability is understanding your employees are valuable assets. Hire talented people. Hire talented people, train them, empower them, and then reward them. That's how you build a healthy organization."

Participant 1 said, "Talented, hard workers are tough to find, so if you have someone who can be an asset to your company, see their personal goals to keep them in your organization."

The business owner participants understand employees' importance to differentiate their business from the competition. These small business owners are in the fast-paced restaurant industry. In the restaurant industry, quality food and service are pivotal to business success. Participant 3 stated,

We talk about quality, service, cleanliness, and value in my business. The quality of the product is paramount. Our product is food, bad quality food will not keep you in business long. So, you have to make sure you have vested, interested, and talented employees so that the quality of your food is cooked properly.

Participant 2 added that,

When the demand for products increases, I increase their production and teach my employees how to make it. I have to depend on my employees to make sure the product's quality is good enough for customers to eat and make innovative suggestions if the product is not up to par.

The theme of hiring talent employees confirmed previous researchers' findings and corroborated the existing body of knowledge on effective business practices.

According to Berry (2017), hiring talented people is crucial in developing a competitive advantage. Gifted people worldwide help business owners create innovative ways to differentiate their products and services from their competitors. Getting a high level of service quality from your employees becomes essential in forming an image and increasing a sustainable competitive advantage because competitive advantage success is driven by service quality that exceeds customer expectations (Jelčić, 2014; Venter & Dhurup, 2014). All three participants' responses align with Porter's (1980) competitive advantage theory of differentiation strategy because hiring talented employees contributes to small businesses differentiating their competition services or products.

### **Theme 3: Operating Business at Low Cost**

All participants expressed the need to operate their business at the lowest cost possible. Small companies do not have the luxury of running their business with massive cash flow. Small business owners have to manage their business for the least amount of money until they can make more profits to expand their business (see Table 3).

**Table 3***Coding of Participants' Responses Related to Operating Business at Low Cost*

Theme	Participants <sup>a</sup>	Responses <sup>b</sup>
Operating business at low cost	3	18

*Note.* <sup>a</sup>Number of owners who answered interview questions. <sup>b</sup>Number of participants' responses linked to the themes.

Participant 1 stated,

You have to know your business's essential cost needs and what is considered an extra cost to your business. A small business owner needs to know what will get them up and operating for the least amount of money. Everything you pay to get your business started will have you becoming a customer instead of a business owner. Most business owners want to be creative and begin buying expensive stuff, but they spend so much unnecessary money trying to be different. You are in business to make money, not give it away to other companies and become a customer. Start making money first with the essential startup cost, then once you have established some financial grounding, go out and update your business.

Small business owners must constantly manage business expenses. Many and high expenses have a negative effect on a business's profitability and sustainability (Turner & Endres, 2017). Identifying the most cost-efficient purchases is vital to a small business's survival.

Even when small businesses start becoming profitable, the business owner must operate the business without taking a majority of the profits. Even when the company is

successful, small business owners should live below their means and not overdraw the business. Participant 3 explained how small businesses are unable to be successful once the owners start taking more money than the business is making:

Small businesses have to live beneath their means. You can have a lot of revenue coming in, but only a small percentage is the business owners. I have seen small business owners fail because small business owners have overdrawn. Most of the time, small businesses' problems are financial. The owner would overdraw the business, meaning they took more money for themselves than the business was making.

Operating business at a low-cost theme confirmed previous researchers' findings and corroborated the existing body of knowledge on effective business practice. According to Enida et al. (2015), small business owners should attempt to seek and sustain a competitive advantage based on cost leadership strategies for a long-term strategy. Cost leadership strategies depend on the business's unique capabilities to achieve and sustain a low-cost position in its industry of operation (Chepchirchir et al., 2018). All three business owners had different views on creating low business operations. Still, all responded that their business operation's low cost keeps them sustainable and competitive in the restaurant industry.

All three participants' responses align with Porter's (1980) competitive advantage theory of cost leadership strategy. Their responses show how business owners operate their businesses to get the most production for the lowest cost. Cost leadership strategy is not about having the most inferior cost product or service on the market. Cost leadership

strategy focuses on having the lowest operation cost in which business owners can produce their product more effectively and consistently.

### **Applications to Professional Practice**

The study results could help current and future small business owners in the restaurant industry identify and implement competitive strategies to remain sustainable in their market. Based on the study findings, small business owners can use the most impactful competitive strategy in customer service to differentiate themselves in the restaurant industry. All participants identified that providing personal customer service to their clientele is a key contributing factor for sustainability and competitive advantage. Customer service and competitive advantage have been well-researched (Lele, 1997; Verstrepen et al., 1999). Kuncoro and Suriani (2018) indicated companies acquire sustainable competitive advantage through their ability in developing a set of main competence such as customer service so that they can service their targeted customers better than their competitors indicates that for the longer term. Participant 1 said, “Customer service is the most important thing in the restaurant business. It will make you or break you.”

Small business owners can benefit from this study by seeing the importance of personalizing customer service and implement strategies to strengthen their customer service relationships with their clientele. Personalize customer service strategies were proven effective by the participants’ organizational documents, which showed the number of returning customers and positive business service reviews that helped gain

more customer attraction. Also, personal customer service proved positive morals to the participant's employees and customers.

Business owners that have their employees speak and greet customers have a better relationship with the customer they are serving. Small businesses can differentiate themselves from their competition by being consistent with their customer service to return to the same excellent service experience. Participant 2 expressed the importance of giving the same consistent customer service level to customers. Participant 2 stated, "Business owners need to be consistent in what you are selling and servicing to your customers. You have to give that same experience each time they come to your restaurant."

### **Implications for Social Change**

According to SBA (2020), from 1994-2018, an average of 67.6% of new employer establishments survived at least 2 years, and during the same period, the 5-year survival rate was 48.8%. This study's findings could serve as a reference document for small restaurant business owners to explore and utilize competitive strategies to remain sustainable beyond 5 years. Small business owners in the restaurant industry are in a highly competitive market, and to stay sustainable longer than 5 years, they must differentiate themselves from their competition. Using the competitive strategies from this study's findings, small business owners in the restaurant industry can add additional strategies to improve their business sustainability. As small business owners in the industry start to execute their competitive strategies, small business survival rates will increase, sustaining themselves in the market beyond 5 years.

When small businesses are sustainable, they create jobs for U.S. citizens and stimulate their economies. As the national economy's lifeblood, small businesses create two thirds of new jobs and drive market innovation and competitiveness (SBA, 2019a). Since the beginning of the 21st century, small businesses made 10.5 million new jobs available, while large businesses opened up 5.6 million new jobs (SBA, 2020). Small businesses provided 65.1% of new job creation throughout the 21st century (SBA, 2020). More job creation helps economic stability for surrounding communities, provides funding for local school districts, lowers poverty rates, and increases communities' development in the Dallas area.

### **Recommendations for Action**

Providing recommendations for research findings helps both aspiring and existing researchers improve on the current study phenomena (Tsang, 2014). Three themes were identified through methodological triangulation of semistructured interviews, review of academic literature, and organizational documents. I have three recommendations that could help to aspire and existing small business owners to sustain their restaurant businesses beyond 5 years in a competitive market. The recommendations include (a) build customer relationships, (b) train and develop employees, and (c) be resourceful and flexible as a business owner.

The first recommendation is for small business owners to build customer relationship strategies to help sustain their businesses beyond 5 years. The participants' responses indicated that small business owners who build customer relationships with their clientele create positive customer experiences. When customers have positive

experiences, they are more likely to return for future services. The participants indicated how important it is to return customers to the restaurant industry. Forming customer relationships can build small businesses' customer base and differentiate them in a competitive market.

The second recommendation is for small restaurant business owners to train and develop their employees. All participants indicated that small business owners should hire talented people, train them, and develop them. It is hard to find talented, hard-working employees, but small business owners can give their employees all the necessary tools to be successful. I recommend training employees to understand the skills needed for the work and developing them for career growth opportunities. Small business owners should meet their employees' personal goals and align them with the business's goals.

The third recommendation is for small restaurant business owners to be resourceful and flexible. All participants' responses indicated that small business owners have to be resourceful when owning a small restaurant business. Small business owners have to operate their business for the lowest cost possible, and they have to do certain operation tasks on their own without paying for outside help. Business owners have to be flexible because they are responsible for their business.

The findings will be disseminated in different ways to ensure both new and existing small restaurant business owners have access to the information. I expect to disseminate the results of this study through scholarly journals that are a free download to the public. I plan to share this study's findings by presenting them at entrepreneurial



mentorship conferences. Lastly, I plan on writing about the finding of this study with a local small business blog or magazine.

### **Reflections**

The Doctoral Business Administration study process has been a challenging but rewarding personal challenge for me. I went through so many personal changes in my life that I did not know when I would be able to complete this program. While being in this program, I got married, changed jobs, lost a small business, went through financial struggles, and started a family. I did not fully understand how to navigate through the program. It seemed as if I was not going to finish. Then I started to understand the program, received a great committee chair who was a phenomenal leader, and used the process to develop my personal and educational growth. I started to take my time with the program and not be in a rush to finish. I emphasized the process, and in return, my goal of completing this program became reachable.

Being a small business owner in the past, I thought that I would know or have an idea of the responses from the participants of this study. As I started collecting data, I gained more knowledge and understanding about small business owners' competitive strategies to remain sustainable in their market. During the semistructured interviews with the small business owners, I listened as they revealed a level of information that can help other small business owners who are struggling with sustainability in their markets. The participants were comfortable giving key strategies that gave me a new outlook on owning a small business.

After completing the study, I learned small business owners have to do little things to gain a competitive advantage in their market. It is very important to provide a great personal level of customer service as a critical tool to gain and keep customers. Also, hiring talented employees helps small businesses to thrive and grow. Lastly, operating a small business at a lower cost could keep the small business sustainable for some time. All the things I learned in this study were personal because I wanted to know how did my small business fail. By conducting the research on small business owners, I have a coherent understanding of what it takes to sustain a small business.

### **Conclusion**

Small businesses are the economy's lifeline. The United States needs small businesses to remain sustainable and prosperous because they are vital to economic growth. However, most small businesses fail before their 5th anniversary (SBA, 2016b), suggesting many small business owners lack the competitive strategies necessary to sustain their businesses. By using competitive strategies such as building systems for customer relationship management and training and developing employees in addition to being resourceful and flexible, small business owners can sustain their business. The conceptual framework presented in this study, known as Porter's competitive advantage theory, represents one tool by which small business owners can identify competitive advantages, gain more allure with potential customers, and make more sales than their market competitors.

Videoconference-based semistructured, interviews and reviews of organizational documents were used to collect data from three restaurant business owners in a large

metropolitan city in Texas. Three themes emerged from the data: personalizing customer service, hiring talented employees, and operating the business at a low cost. The findings indicated that small business owners need to use these three successful competitive strategies to sustain their small businesses. When small business owners can differentiate themselves to remain in a competitive industry, they can create jobs to help economic stability for surrounding communities, provide funding for local school districts, lower poverty rates, and increase community development. The findings suggested there are additional opportunities to explore these competitive advantages in the restaurant industry to help other small business owners' sustainability in the highly competitive restaurant industry.

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## Appendix: Interview Protocol and Interview Questions

**Interview Protocol**

- I. Turn on laptop
- II. Log into Zoom meeting video conference
- III. Introduce myself to participant(s) over video conference
- III. Explain the interview process
  - a. Explain content
  - b. Answer questions
  - c. Discuss any participant concerns
- IV. Ask for permission to turn on audio recording device
- V. Turn on the audio device
- VI. Take notes during interview
- VII. Begin with question #1; follow through to final question
- VIII. Ask follow up questions
- IX. Discuss member checking
  - a. Question Discussion
  - b. Response Discussion
- X. Provide my contact information for follow-up questions
- XI. Thank participants
- XII. End interview protocol



### **Interview Questions**

1. What strategies have you implemented to sustain your small business?
2. What entry boundaries have you faced from the marketplace that made it difficult for you to start your small business?
3. What characteristics are important to you as a small business owner to sustain your business for at least 5 years?
4. What strategies do you use as a small business owner to improve your business operations?
5. How do you test the effectiveness of your strategies to see what does work and what does not work?
6. How do you continue to remain sustainable with your business with big companies in the same marketplace?
7. What kind of customer services strategies do you use to maintain the customers you have while also trying to gain new customers?
8. What additional information can you provide about strategies you have used to sustain your business at least 5 years?