

2023

## **Business Functions Capabilities and Small and Medium Enterprises' Internationalization**

Henry Mbidde  
*Walden University*

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# Walden University

College of Management and Human Potential

This is to certify that the doctoral study by

Henry Mbidde

has been found to be complete and satisfactory in all respects,  
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2023

Abstract

Business Functions Capabilities and Small and Medium Enterprises' Internationalization

by

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MBA (Marketing and Management), Makerere University, 2005

BBA (Marketing), Makerere University, 2000

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

May 2023

## Abstract

Ineffective global expansion can adversely affect small and medium enterprises (SMEs) business outcomes. Business leaders are concerned with developing effective global expansion strategies to penetrate potential international markets, thus enhancing sustainability. Grounded in the business management systems theory, the purpose of this qualitative multi-case study was to explore strategies that leaders of Sub-Saharan Africa manufacturing SMEs use for global expansion. The participants were five manufacturing value-adding SME leaders participating in export markets. Using Yin's five steps data analysis process, six themes emerged: (a) enterprise characterization, (b) understanding the enterprise's product, (c) intra-enterprise factor-based strategies for export participation, (d) the enterprise's external factor-based strategies for successful export venture, (e) global expansion strategies, and (f) serendipitous findings. A key recommendation for SME leaders is to analyze the critical components of their products and prepare to adjust them to the demand dimensions of the target market. The implications for positive social change include the potential to increase the enterprise's wealth, increase employment, reduce poverty for all value chain participants, and growth in gross domestic product.

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## Dedication

I dedicate this study to my JESUS CHRIST, my SAVIOR, with whom we have walked this journey without HIM forsaking me. I also dedicate the study to my lovely Mum, Ms Christine Namatovu, who has patiently waited for my inevitable completion of this DBA (International Business) adventure that I undertook several years ago.

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## Table of Contents

<b>Section 1: Foundation of the Study</b> .....	<b>1</b>
Background of the Problem .....	2
Problem Statement .....	3
Purpose Statement .....	3
Population and Sampling .....	4
Nature of the Study .....	4
Research Question .....	6
Interview Questions .....	6
Conceptual Framework .....	7
Operational Definitions .....	8
Assumptions, Limitations, and Delimitations .....	10
Assumptions .....	11
Limitations .....	13
Delimitations .....	14
Significance of the Study .....	15
Contribution to Business Practice .....	15
Implications for Social Change .....	16
A Review of the Professional and Academic Literature .....	16
Theories of Firm Internationalization .....	18
Uppsala Internationalization Process Model .....	19



International Entrepreneurship Models .....	21
Network Approach Theory .....	23
Resource-based View Theory .....	25
Born Global .....	26
Born Again Global .....	27
Summary .....	29
The SME Internationalization Models .....	31
The SCOPE Theory of SMEs Internationalization .....	32
The 7-P Theory for SME Internationalization .....	32
The CPP Theory for SME Internationalization .....	33
Corporate and Individual Global Mindset .....	34
Theoretical Foundation of the Study .....	35
The Business Management Systems Theory (BMS) .....	36
Key Tenets of the BMS Theory .....	40
BMS and Internationalization .....	55
Managerial Entrepreneurial Activities .....	56
Small and Medium Enterprise Internationalization .....	59
Mapping the Study onto the BMS Theory .....	60
Transition .....	61
<b>Section 2: The Project .....</b>	<b>63</b>
Purpose Statement .....	63
Role of the Researcher .....	63

Personal Lens .....	63
Participants .....	65
Eligibility Criteria .....	65
Gaining Access to Participants .....	65
Establishing Working Relationship with Participants .....	66
Aligning Participants with Overarching Research Question .....	67
Research Method and Design .....	67
Research Method .....	68
Research Design .....	70
Rigor	73
Data Saturation .....	77
Population and Sampling .....	77
Defining the Population .....	77
Sampling .....	78
Ethical Research .....	79
Data Collection Instruments .....	82
The Instruments and Techniques .....	82
Researcher’s Role .....	87
Enhancing the Reliability and Validity of the Instrument .....	88
Instrument Appendage .....	90
Data Collection Technique .....	90
Advantages of Data Collection Techniques .....	91

Disadvantages of Data Collection Techniques .....	93
Data Organization Technique .....	94
Data Analysis .....	94
Reliability and Validity .....	97
Reliability .....	97
Validity .....	98
Transition and Summary .....	100
<b>Section 3: Application to Professional Practice and Implications for Change .....</b>	<b>102</b>
Introduction .....	102
Presentation of the Findings .....	102
The Case SMEs Studied .....	103
Theme 1: Enterprise Characterization .....	106
Theme 2: Understanding Our Product .....	108
Theme 3: Intra-enterprise Factor-based Strategies for Export Participation .....	111
Theme 4: Enterprise's External Factor-based Strategies for Successful Export Venture .....	145
Theme 5: Global Expansion Strategies .....	147
Theme 6: Serendipitous Findings .....	148
Application to Professional Practice .....	151
Implications for Social Change .....	153
Recommendations for Action .....	154
Who Needs to Pay Attention to the Results .....	155

Disseminating the Results .....	156
Recommendations for Further Research .....	156
Reflections .....	157
Conclusion .....	159
<b>References .....</b>	<b>161</b>
<b>Appendix A: Interview Guide .....</b>	<b>232</b>
<b>Appendix B: Showing the Business Management Systems Theory .....</b>	<b>240</b>
<b>Appendix C: Showing the Conceptual Frame of the Study Based on The BMS Theory .....</b>	<b>241</b>
<b>Appendix D: The Abridged Data Collection Protocols for the Various Data Collection Methods .....</b>	<b>242</b>
<b>Appendix E: The Attendant Thematic Framework of the Study .....</b>	<b>243</b>

List of Tables

Table 1. Detailed Information about the Participating SMEs ..... 106

## Section 1: Foundation of the Study

In this study, I explored optimal strategies for global expansion for small and medium enterprises (SMEs) in Sub-Saharan Africa (SSA). I focused on how managers of SMEs in SSA, especially in Uganda, develop and adapt optimal global expansion strategies. Section 1 of this study includes the background of the problem, the problem statement, the purpose statement, the nature of the study, the research question, and the interview questions, among others. Section 2 of the study includes the research method and design, sampling design, data collection, organization, and analysis design, to explain how the researcher achieved reliability and validity. Section 3 includes descriptions of the findings and their implications for social change, recommendations for action, further research, and reflections.

International business is instrumental in expanding participating enterprises and growing the global economy (Revindo et al., 2020). Enterprises participating in international business benefit from the numerous opportunities offered, including markets, resource mobilization, adapting brands to domestic and international markets, and tapping into competitive platforms and strong networks (Kraus et al., 2017). Enterprises can develop global competitive brands, acquire accurate knowledge about international markets, get exposed to trending technologies, and easily tap into global value chains (Sanyal et al., 2020a; Zhu et al., 2019).

Since the 1980s, international transactions of manufactured value-added (MVA) merchandise have tremendously grown, from \$40 billion to over \$18.9 trillion in 2019 (Popescu, 2019). To date, MVAs continue to grow at 11.4% per annum (Koopman et al.,

2018; United Nations Conference on Trade and Development [UNCTAD], 2020; World Trade Organization [WTO], 2021).

### **Background of the Problem**

Out of the current total global MVA trade value, SMEs contribute 90%, and 95% of these SMEs operate from emerging and developed economies (González & Sorescu, 2019). This trade situation demonstrates a conspicuous absence of SMEs from developing economies. African SMEs contribute 2.59% to the total world MVA trade value of \$17.619 trillion (Evans et al., 2018; OMC, 2021; UNCTAD & WTO, 2020; WTO, 2021). These statistics imply that SSA SMEs are not significantly participating in the international MVA trade, which may impede their rapid growth (Freixanet & Renart, 2020; Safari, 2020).

Business leaders who focus on building wealth for their enterprises identify, penetrate, exploit, and expand into potential domestic and international markets. Participating in such markets results in the rapid growth of the enterprise (Tolstoy et al., 2021; Vanderstraeten et al., 2020). Internal push factors like learning, ambition, and resources can drive an enterprise to penetrate and serve international markets (Gkypali et al., 2021; Vitrenko et al., 2020); likewise, pull factors like trade, operational opportunities, global networks, and supply chain network can attract it (Amos et al., 2020; Chaldun et al., 2020; Stanković, 2021; Vitrenko et al., 2020). There is a gap in the literature explaining how SSA SME managers develop and adapt optimal global expansion strategies for internationalization (Ashna Chandra et al., 2020). It is debatable whether

SSA's SMEs' global expansion can occur from well-developed business functions' tasks (Falahat et al., 2020).

### **Problem Statement**

Participating in international markets with manufactured value added (MVA) merchandize could increase SMEs' growth and expansion (Chandra et al., 2020; González & Sorescu, 2019). African SMEs engaged in MVA merchandize contribute 2.59% to the \$17.619 trillion or an equivalent of \$456.33 billion of that world trade category, out of which SSA SMEs contribute 22.59% or \$ 103.099 billion (Evans et al., 2018; OMC, 2021; UNCTAD & WTO, 2020; WTO, 2021). The performance of SSA SMEs reflects minimal participation in international markets (González & Sorescu, 2019; Guili, 2018). The general business problem is that most Sub-Saharan manufacturing SMEs do not access international markets, which limits their growth and expansion efforts. The specific business problem is that some leaders of SSA manufacturing SMEs lack optimal strategies for global expansion.

### **Purpose Statement**

The purpose of this qualitative multi-case study was to explore the strategies that leaders of SSA manufacturing SMEs use for global expansion. To participate in the interviews for this study, I targeted five MVA SME managers located in the central industrial hub of Uganda who successfully implemented strategies for building optimal business functions and capabilities for global transactions. The study may positively contribute to social change by enhancing the SMEs' drive to access global markets for rapid expansion, increasing employment, economic empowerment, and participation, and



raising the standards of living of the wider communities. Manzoor et al. (2021) and Surya et al. (2021) asserted that SMEs are progressively becoming key drivers of economic growth, generating sustainable micro employment, poverty alleviation, and financial inclusion.

### **Population and Sampling**

The study population was managers of SMEs who successfully built business functions' tasks for their enterprises; Michaud-Dumont et al., (2020) supported the idea of choosing participants with experience of a phenomena under study; such enterprises were located in Uganda, and exporting their MVAs. Because Uganda has few internationalized MVA SMEs, the I targeted five cases. According to Dang Nguyen et al. (2019), a multi-case study must target a minimum of four cases for optimal benefits of a case inquiry design. I purposefully chose five cases that demonstrated a practical experience of the internationalization phenomena; they included SMEs engaged in international transactions.

### **Nature of the Study**

Of the three research methods of qualitative, quantitative, and mixed methods, I selected the qualitative method to use open-ended questions to establish what participants are doing or have done in the past about their SMEs' internationalization. Chandra et al. (2020) and Khoury et al. (2021) demonstrated that open-ended questions are appropriate to establish participants' perceptions, behaviors, and experiences of a phenomenon. In contrast, quantitative researchers use closed-end questions to test relationships between the hypothesized contextual and theoretical variables (Al-adeem, 2018; Ooi &

Richardson, 2019; Sanyal et al., 2020a). Mixed methods include a quantitative component of hypothesis testing (Harrison et al., 2020; Plano Clark, 2019). To establish how leaders build optimal strategies for their SMEs' global expansion, no test of hypotheses took place that are part of the quantitative study and the quantitative portion of mixed methods. Therefore, the quantitative and mixed methods were unsuitable for my study.

To explore SME internationalization in this qualitative inquiry, I considered three research designs: phenomenological, grounded theory, and case study. I used a case study because of its methodical ability to examine a phenomenon in-depth within its real-life context and the ability to pursue flexibility in the phenomena through an intensely analyzed system, unit, situation, or population. Yin and Hollweck (2016), Gallagher (2019), Kelly and Cordeiro (2020), and Yin (2018) argued that case studies are ideal when one is studying contextual real-life phenomenon. Because my goal was to study only leaders who make decisions to deploy resources, exploring more than one contextual and bound frame cases exposed me to a deeper and broader appreciation of the various activities, motivation, and decision frames they engage in developing global expansion strategies. I used a multiple case study with varying bound frames, contextual components, and analyses to create a detailed and holistic understanding of the complex phenomena of enterprise internationalization; this is in line with Yin and Aberdeen's (2013) bounded frames and contextual details.

Phenomenological study designs establish the unique underlying meanings of phenomena through participants' lived experiences (Dörfler & Stierand, 2020; Moustakas,

as cited in Liao et al., 2021; Rajasinghe, 2020). The phenomenological study design was not suitable for my study because the goal was not to probe managers' experiences but rather their actions in deployment. Business researchers use grounded theory to generate a substantive theoretical explanation of a phenomenon. Researchers do this through a systematic collection and inductive data analysis resulting in a phenomena-tailored theory (Charmaz & Thornberg, 2020). They do not use phenomenological study design for analyzing contextual issues (Muzychenko & Liesch, 2015). Because I did not focus on developing a theoretical framework but on exploring contextual issues of SME internationalization, I could not use grounded theory.

### **Research Question**

The research question for this study was: What effective strategies do MVA SME managers use for global expansion?

### **Interview Questions**

1. What have you done to exploit and expand into global markets?
2. What strategic enterprise factors do you consider critical as you seek to engage in international transactions?
3. What strategies are you using to build and run optimal and efficient production and marketing tasks of your enterprise?
4. What are the critical production tasks you have used to produce goods for international markets?
5. How did you obtain your first international supply order?

6. How do you reach, communicate, inform, and educate targeted international markets about your products?
7. How do you negotiate for sufficient selling prices while servicing international customer orders and prompting payments?
8. How do you identify your international customers' unmet needs that your products fulfill?
9. What other information would you like to share about your business functions and capabilities that sustain your international operations?
10. What other information would you like to share about your international transactional experience that I did not ask?

### **Conceptual Framework**

Balboni et al. (2013) developed an internationalization model in which they asserted that a firm's functional and relational capabilities were vital to its internationalization success. According to them, SMEs can penetrate international markets if they adequately build their firms' internal and relational capabilities. Atac (2005) published this theory emphasizing that building business functions' tasks is a critical requirement for a competitive business. Atac asserted that, with adequately developed business functions' tasks, a firm's products could be traded in any market.

Atac (2005) explained that the tasks enabled management to identify the market's needs and configure the appropriate product dimensions that best satisfy those needs. Atac demonstrated that managers have information, physical, financial, human, and networks resources at their disposal; they can configure an operational strategy that aligns

the business functions' tasks with the demand dimensions of the target market. Atac implored managers to determine the right combination of resources and deploy them in the right quantities and qualities to develop the critical tasks in production and marketing. Therefore, managers must make the right decisions on the quality, quantity, time, and costs of resources for every critical task, and the resulting product dimensions must perfectly align with the needs-dimensions of the market. Therefore, Balboni et al.'s (2013) functional and relational capabilities internationalization model and Atac's Business Management Systems (BMS) theory aligned with this study.

### **Operational Definitions**

*Capabilities:* Gruber-muecke (2018) defined capabilities as knowledge-based activities of a firm. Managers use capabilities to develop transformational and production tasks to create value out of the firm's resources; the practicality and shrewdness of capabilities depend on the firm's innovative capacity, scope, and speed of creating new knowledge. Metsola et al. (2020) categorized capabilities into two components: the dynamic component that galvanizes the firm's internal and external resources to create a firm's strength, and the operational component, which is the ability to exploit the firm's assets to create tangible and intangible value. Parnell and Brady (2019) observed that capabilities enable a firm to effectively harness its resources to build its competitive advantage and drive its internationalization agenda.

*Developing economies:* These are economies that experience low income per capita, rapid economic growth, and market liberalization as their primary growth engines (Kashif et al., 2018).

*Direct trade:* This is when an SME directly sells its MVAs to customers in other countries. Then, the customers take the title of the merchandise even when it has to flow through logistical and supply-chain protocols (Ito & Saito, 2021). The physical movement of the MVAs involves companies in the global supply chains (GSC), which receive and dispatch the merchandise without taking title or ownership.

*Internationalization:* Internationalization is any type of cross-border activity to (a) identify and serve markets, (b) source and procure inputs, (c) identify and build strategic alliances, (d) establish production facilities, and (e) network with foreign business players (Angulo-Ruiz et al., 2020; Wach et al., 2018). A firm internationalizes if it synchronizes its critical operational structure (a combination of critical tasks), operational processes, and corporate-level strategy framework with the targeted international market's environment (Saridakis et al., 2019b).

*Internationalization strategy:* Internationalization strategy is a set of strategic goals and actions that demonstrate a firm's intended transnational business model. The strategy is crafted based on the firm's competitive competencies that are critical for international transactions (Morais & Ferreira, 2020a). Crafting the strategy is a structured planning process intended to develop critical tasks for business functions.

*Manufactured value-added merchandise:* Manufactured value-added merchandise refers to a company's end products that it offers to various market targets, including domestic and international markets, to address specific customer needs (Koopman et al., 2018). The company can either be large, medium, or small, and is owned or managed by

personnel who determine how to transform raw materials into finished products for ultimate consumption, competitively.

*Small and medium enterprise (SME)*: Definitions for SMEs vary from country to country (Dominik & Rauch, 2020). The most common attributes that determine if an enterprise is an SME include the number of employees, the company's capital, and the company's annual revenues (Wapshott & Mallett, 2018). The most commonly used index is a simple headcount of employees under the jurisdiction of the enterprise (Morais & Ferreira, 2020a). Particularly for this study, I adopted Uganda's conceptualization of an SME as a small company that employs between five and 50 people and has an annual income of between \$16,500 and \$33,000 (Ssemambo et al., 2021).

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

The choice and success of a firm's internationalization agenda are predicated on the benefits and succinctness of its game plan implementation that management envisages (Saridakis et al., 2019). To craft and implement a competitive internationalization strategy, the manager combines several attributes, including knowledge, drive, experience, perceptions, cultural influence, interpretative frame, and decision-making mechanisms (Paul, 2020). These managerial attributes, competencies, and virtues are individual-based, subjective, and cannot be observed or measured (Abubakar et al., 2019; Al-Ababneh, 2020). Therefore, the quality, relevancy, and versatility of those managerial attributes can only be investigated, probed, and interpreted through questioning. Whereas the internationalization framework of a firm heavily hinges on the manager's influence (Anwar et al., 2018; Freixanet & Renart, 2020b), it can be

effectuated through learning, institutional knowledge construction, and the efficacy of a hierarchical decision-making framework (Kelly et al., 2018; Vogl et al., 2019).

### **Assumptions**

Assumptions are beliefs, acceptable behaviors, and interpretational frames that researchers make about the phenomena; they reflect conditions under which the phenomena occur and the researchers' philosophical approaches to the study (Simon & Goes, 2013; Theofanidis & Fountouki, 2018). Researchers take these assumptions for granted and cannot prove them (Nenty, 2009).

In this study, I assumed that participating SMEs' managers were honest while answering the questions about their decision-making efforts, practices, and behaviors during the probe. I assumed that Uganda's business environment was fully liberalized for all subsectors, so participating SMEs could freely compete for market segments. According to Rashid et al. (2019), as a researcher approaches a study, they must define their interpretational frame by declaring the methodology, interpretation, ontology, and epistemology assumptions.

I approached this study with several assumptions, including relativism-ontology, constructionism-epistemology, case-study-methodology, and interpretationalism. I adopted a relativist ontological stance because, as stated by Abdullah-Kamal (2019) and Raskind et al. (2019), there exists an extensive world of realism. This world is independent of its inhabitants and can be accessed through representation by a language, words, and data (Davies & Fisher, 2018; Rees et al., 2020; Sherratt & Leicht, 2020). The world of realism has multiple realities and truths; thus, a researcher's frame of mind is



shaped by the fact that interviewees' responses reflect their business management experiences, cultural influences, and interpretation of their operational environments.

In my epistemological assumptions, I focused on how to construct meaning from objective interactions between interviewees and the researcher. Alpi and Evans (2019) and Ng et al. (2018) advanced the view of objective interpretation and meaning construction rooted into the nature of probe interactions with participants. These assumptions included my belief that the best way to discover business function tasks' building strategies managers of SMEs could use for internationalization would be a multi-case study. I used a holistic approach to understand how managers craft and use unique strategies amidst their unique operational environmental complexities. I cognitively drew closer to the study participants to create a fit-in feeling. According to Abdullah-Kamal (2019), Christofides and Pier (2019), Johnson et al. (2020), and Kelly et al. (2018), if a researcher can fit in with participants, they can harness deeper information, map participants' experiences, and corroborate their interpretations. I assumed that the participants factually expressed their in-depth opinions, gave honest responses, and offered valid statements about their appreciation of the internationalization phenomena and business functions' tasks .

In this study, I adapted an interpretational assumption. McGaha and D'Urso (2019) and Vogl et al. (2019) argued that to adapt an interpretational assumption successfully, the researcher must practice constant self-reflection and bracketing their frame of mind during content interpretation while staying closer to the participants' lived experiences (Natow, 2020c; Rashid et al., 2019). To create meaning, my interpretations included the

analyses of targeted participants' eyes, supported by my relativist-ontological and constructionist-epistemological stances. I also assumed that participating organizations must be exporting their MVAs and would avail the relevant secondary data sources for effectual document analysis.

### **Limitations**

Limitations are unavoidable conditions surrounding a study for which a researcher has no control, yet conclusions must be made amidst these limitations (Nenty, 2009; Simon & Goes, 2013; Theofanidis & Fountouki, 2018). Limitations stem from the methodology and design, the method and nature of sampling, and the data analytics a researcher uses; limitations can potentially restrain fair interpretation, explication, and application of research findings.

I anticipated several inherent weaknesses stemming from this study's proposed design and methodology. Multi-case studies must occur in their respective natural settings to ensure a real reflection of participants' behavior and experience; this may be difficult, and can affect the generalizability and extensity of findings (Rashid et al., 2019; Theofanidis & Fountouki, 2018).

Some of the limitations included: the unique naturalness of the study setting of each sampled case, failure to build effective rapport with the participants, and social desirability bias (Bergen & Labonté, 2020). These limitations can impact optimal data collection and harnessing of honest responses, which may affect the results trustworthiness, generalizability, and smooth replicability (Aguinis & Solarino, 2019; Verd et al., 2021). One of my goals in this study was to build interpersonal relationships,

establish rapport, and maximize composure with all participants; Burgoon et al. (2021), Archibald et al. (2019), and Šerić (2021) emphasized the role of relational communication that is premised on trust, composure, and dominance as a means of expressing implicit meanings between participants. I achieved all the above mentioned virtues through non-verbal intimacy, being fair, applying humor, and engaging in self-disclosure.

I conducted this study during the global COVID-19 pandemic. With such catastrophic conditions that resulted in strict standard operational procedures, some participants could only participate in interviews through asynchronous applications like Zoom. When using asynchronous data collection techniques, interviewers lack a chance to comprehensively observe and analyze nonverbal cues and artifacts, while participants experience interactional and technical issues (Amri et al., 2021; Archibald et al., 2019; CohenMiller et al., 2020; Lobe et al., 2020; Reñosa et al., 2021). However, asynchronous data collection, in some cases, can enhance access to hard-to-reach yet valuable participants, and the researcher can collect data beyond their physical location, increased flexibility, efficiency, and cost-effectiveness (Archibald et al., 2019; Reñosa et al., 2021).

### **Delimitations**

Delimitations are conscious inclusions and exclusions that a researcher makes to set boundaries and narrow the scope of the study (Alpi & Evans, 2019; Ross & Zaidi, 2019; Shiddike & Rahman, 2020; Theofanidis & Fountouki, 2018). I limited the study participants to SME managers from Uganda who were dealing in MVAs and participating in international transactions. I excluded large enterprises and SMEs that are not

internationalized because they were neither confronted with international competition nor were their trade revenue figures captured in the global SME-MVAs trade statistics; a similar selection criterion was used by Asgary et al. (2020) and Gherghina et al. (2020) when they chose SMEs that had a continuous long standing funding and exporting to neighboring respectively.

### **Significance of the Study**

There has been a popularized acceptance in most developing economies that SMEs are intrinsically incapable of embarking on internationalization because of fear of confronting competition on the global platform (Ashna Chandra et al., 2020). Although many developing economies are meshed in several multilateral and bilateral trade protocols and are members of some regional groupings, their SMEs are conspicuously absent from the global trade platform (Ashna Chandra et al., 2020).

### **Contribution to Business Practice**

The results of this study may contribute to business practice by filling a gap in the literature about SME internationalization through building appropriate business functions' tasks and developing a competitive business. Whereas several theories and models about firm internationalization have been proposed and adopted globally, global MVA trade patterns suggest that most beneficiaries are enterprises from bigger economies. However, through the lens of BMS theory (Atac, 2005), any SME can internationalize by developing its intra-enterprise competitiveness.

Competitiveness is a push factor for SMEs to internationalize and confront global competition (Vătămănescu et al., 2019). Readers of this study report will appreciate the

benefits and contribution to the country, organization, and per-capita growth and development that global trade participation can bring. SMEs from developing economies will confront global competition as focused players and take on their role as change agents (Gherghina et al., 2020; Prieto-Sandoval et al., 2019).

### **Implications for Social Change**

The results may benefit MVA SMEs in Uganda to refocus their sustainable value creation efforts toward building the requisite business functions' tasks critical to their growth and expansion (Senge et al., 2010). If SSA SMEs can expand globally, they will experience three major outcomes: First, the economic activities will more than quadruple as more businesses exploit lucrative global markets. Second, there will be optimal resource allocation engineered by distortion-free market forces. Third, because SMEs subtly contribute to economies' micro and macro growth (Prieto-Sandoval et al., 2019), all players, including SMEs from countries like Uganda, will benefit from economic inclusion. The results will contribute to employment, help alleviate poverty, and expand host economies' gross domestic product (GDPs; Gherghina et al., 2020).

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

In this section, I will present the extant literature about the firm internationalization phenomena. I examined various perspectives and lenses through which theorists have explained the internationalization of enterprises. I have analyzed and organized the content as per the appropriate subtopics, the theoretical chronology of the internationalization phenomena, the present research methodological approaches of the phenomena, and the sequence of thinking unclocking the phenomena.

I looked for literature about SME internationalization, specifically from developing and emerging economies. Previous researchers focused on how internationalizing firms prepare internally, their competitiveness, and how they identify, target, and serve cross-border markets. To identify the relevant literature, I used several databases and search engines, including ProQuest Central, Sage, ScienceDirect Collections, Business Source Complete, Taylor & Francis, and Emerald Insights. The key search terms included: *SME internationalization*, *production and innovation capabilities of a firm*, *building an internationalization operation strategy*, *the decisional role of an SME manager in market venturing*, *building and producing quality products*, and *firm internationalization models*.

I studied 463 references, of which 93.1% were peer-reviewed scholarly articles, global institutions reviews and publications, and published books. A total of 433 (93.52%) references were published within the last 5 years, while the literature review section contains 176 references, of which 172 (97.7%) were published within the last 5 years.

Managers of SMEs from developing economies, who aspire to participate in an increasingly globalized (i.e., hegemonic and grass-rooted) marketplace, must focus on internationalization (Uzgören, 2021). Firms can pursue internationalization through trade, investments, funding, and nonequity contracts (Barnard, 2021; Ietto-Gillies, 2021). The literature about firm internationalization indicates several paths to internationalization; some of these paths are triggered by the firm's external factors, while others are prompted by the firm's internal factors (Morais & Ferreira, 2020; Roque et al., 2019).

Zhu et al. (2020) and a plethora of firm internationalization researchers have categorized the firm's internal factors as push drivers and external factors as pull drivers to internationalization (Etemad, 2021; Hänle et al., 2021; Zhu et al., 2020). Related to the push factors, researchers have identified entrepreneurship internationalization, that is, the firm's management enterprising behavior, as a potential trigger of internationalization (Morais & Ferreira, 2020). It is still unknown whether developing an enterprise's business functions' tasks can propel it into internationalization.

There was a gap in the literature about SME managers' perceptions regarding building and adapting optimal global expansion strategies, including business functions' capabilities, to penetrate into and serve international markets. Atac's (2005) BMS theory explains how understanding any market's needs package (i.e., core needs, expectations, habits, and occasions) can inform the configuration of adequate product dimensions that best satisfy those needs. Developing a matching product, which can satisfy the needs package of a target market, can be achieved if a manager develops the enterprise's appropriate production and marketing capabilities (Atac, 2005).

### **Theories of Firm Internationalization**

Firm internationalization has been an area of research interest since the 1970s, and several internationalization theories have been advanced (Morais & Ferreira, 2020a; Paul & Sánchez-Morcilio, 2019). Within the last 50 years of research on internationalization phenomena, researchers developed a plethora of theories based on networks, learning, the firm's resource pool, contingency approaches, stage, entrepreneurial, and business strategy (Baier-Fuentes et al., 2019; Eduardsen &

Marinova, 2020; Hult et al., 2020; Li, 2018; Ooi & Richardson, 2019; Paul & Rosado-Serrano, 2019b; Safari & Saleh, 2020). Several researchers presented theories that attribute firm internationalization to external pull factors, and others have developed theories that portray a firm's intrinsic internal factors as internationalization drivers (Morais & Ferreira, 2020a; Roque et al., 2019).

The inceptive theorists recognized the role of learning in the organization. Proponents of learning theories argued that firms easily ventured into international markets with similar cultural, business practices, and spatial proximity (Morais & Ferreira, 2020a; Weerawardena et al., 2019), and then rolled over to other markets, incrementally. Through learning, a firm gained critical knowledge about production, markets, inbound and outbound logistics, et cetera, and ventured into other country markets. With an increasingly globalizing world economy, companies involved in business must lay strategies for internationalization; so that they can ably adapt their operational capabilities to the structure, dynamics, resources, and practices in the international environment (Coudounaris, 2018; Dar & Mishra, 2019; Fernandes et al., 2020; Morais & Ferreira, 2020a).

### **Uppsala Internationalization Process Model**

Whereas scholars and practioners expended several efforts to study the concept of firm internationalization earlier on, the Uppsala model (Johanson & Vahlne, 1977) debuted as the conventional model that triggered incessant and detailed scrutiny of the phenomena. Johanson and Vahlne (1977) observed that internationalization occurred out of learning; the more a manager of an enterprise learns the culture, the business practices,



the economic environment, and the potential customers in a potential export market, the more likely they can export to that country. Arguments included that firms enter markets with which they have propinquity advantage or shorter psychic distance; psychic distance is created by knowledge gaps (Johanson & Vahlne, 1977). In effect, Johnson and Vahlne (1977) premised their study of foreign market entry on learning, for which the psychological distance with the domestic market determined the choice of entry mode.

Continuing with the idea of learning, Johnson and Vahlne (2009) improved their earlier version of the theory and looked at markets as an invisible complex pattern of networks in which players are interlinked. They observed that a firm which has not endeavored to tap into international networks is haunted by the outsider-ship liability. In the same mind frame, Dabić et al. (2020) explained that enterprises which tapped into international networks do enjoy insidership, and they easily learn the practices, availability of opportunities, build trust amongst players, and do commit to operating in such networks (Coudounaris, 2018; Dabić et al., 2020; Johanson & Vahlne, 2009; Morais & Ferreira, 2020a; Roque et al., 2019). Dabić et al. concurred with Johnson and Vahlne when they explained that participating in an international network minimized the challenges of foreignness liability and outsidership. These challenges impeded action and speed of the firm internationalization.

Firms that are limited by technological capabilities can also apply the Uppsala model; such firms can unobstructively tread the gradual internationalization path as long as they begin with culturally and geographically propinquity host countries (Sanyal et al., 2018). Related to the Uppsala model's underlying principle of learning is the stage-based

model of internationalization. Cavusgil (1994) (as cited in Coudounaris, 2018) advanced the stages model after observing that enterprises go international through stages. Firms debuted into international markets incrementally; they start with exporting, which is the most cost effective entry mode, then establish a commercial subsidiary, and a productive subsidiary, there after (Coudounaris, 2018; Roque et al., 2019).

Considering the tremendous progress Uganda has made in improving its business environments, including ICTs' support services, many Ugandan SMEs can potentially tap into the wider business networks and leverage on insidership advantage. While the Uppsala model illuminates the importance of incremental learning of potential country market targets, the current advancement in information technologies enable firms to galvanize organizational learning and to acquire pre-internationalization markets' knowledge, earlier. Acquiring relevant markets' knowledge quickly, increases the firm's internationalization opportunities and speed (Mudalige et al., 2019). In the conceptualization framework of this study, a question loomed as to why a significant number of Uganda's SMEs were not internationalized to exploit the ever-expanding global business opportunities.

### **International Entrepreneurship Models**

International entrepreneurship (IE) portends a creative process by which management of an enterprise identifies, establishes, and exploits business opportunities outside its domestic market (Baier-Fuentes et al., 2019; Perényi & Losoncz, 2018; Schwens et al., 2018). International entrepreneurship theories constitute several views like the international new venture (INV), the born global (BG), and the born again global

(BAG). Theorists of all these models demonstrated that an IE firm will proactively adopt a rapid and intuitive approach to internationalization right from inception; they attributed this approach to the firm's affinity to learn and adapt to international business environments (Andersson et al., 2018; Ashna Chandra et al., 2020; Dabić et al., 2020; Morais & Ferreira, 2020a; Rosário & Raimundo, 2021).

Zhu et al. (2020) and Roque et al. (2019) argued that a manager must apply a combination of entrepreneurial virtues like: showing responsiveness to host country's ethnic networks, nurture strong working relationships with country stakeholders, and develop strong connection with state authorities. These entrepreneurial dynamics are critical in accessing relevant resources and expediting the enterprise citizenship into the host market. The internationalization preparedness of the firm as related to: costs and time, its precocity, scope, and managerial steadiness, are critical for an entrepreneurial approach (Głodowska et al., 2019; Wach et al., 2018). Other theorists remarked that external market-specific knowledge is instrumental to triggering entrepreneurial-based and processes-based internationalization (Johanson et al., 2020; Kokotsaki et al., 2019; Magni et al., 2021; Munim et al., 2020; Wadeson, 2020). If a manager could accumulate that critical knowledge, they could minimize the challenges of outsidership and foreignness.

Although internationalization has been conceptualized as a tendency driven by the firm's exogenous opportunities like managers' networks (Morrish & Earl, 2021; Rubino et al., 2019), managers must craft strategies to guide a firm to exploit the potential opportunities. A well-crafted strategy reveals an internationalization plan, for which a

firm can expediently serve global markets irrespective of its age, the generation of managers running it, and speed of action (Zhu et al., 2020). Business opportunity related knowledge from foreign networks about customers, culture, the legal environment, the distribution networks and practices, the nature of value chain activities and actors, are critical inputs for an enterprising manager to craft strategies of internationalization (Hilmersson & Johanson, 2020).

### **Network Approach Theory**

Andersson et al. (2018) developed the network theory of internationalization; they argued that an enterprise depend on other firms' controlled resources, and it can access them if it occupied a position in their networks (Andersson et al., 2018; Idris & Saridakis, 2018). A firm will tap into the competences and capabilities of people, capacities of other firms in the network to achieve a distinctive advantage and network citizenship (Idris & Saridakis, 2018). Proponents of the theory identified the criticality of working relationships between a set of actors in the internationalization framework as the foundational cores of the network; these actors can be buyers, competitors, suppliers, influential families, etcetera. (Kozma & Sass, 2019).

As the firm grows its relationships and meshes with other firms in the network web, it will gain the insider-ship status (Lagerström & Lindholm, 2021; Su et al., 2020). Insidership into an international community network enables a firm to operate and unreservedly access critical knowledge and to tap into other relevant industrial practices (Gerschewski, Evers, et al., 2020; Morais & Ferreira, 2020a). Several researchers have identified four types of networks including geographical proximity, buyer/supplier,

personal and ethical-based ties, and organizational integration (Morrish & Earl, 2021; Rubino et al., 2019; Su et al., 2020). Proponents of the theory argued that gaining insidership minimize outsidership liabilities for a given networks, and is critical in identifying, accessing, and exploiting market opportunities (Khan & Lew, 2018).

Endogenously, a firm can gain relevant knowledge from its anchored networks; this can stimulate the firm's internationalization drive by tapping into global-supply-chain of critical resources while reducing risks and uncertainties (He et al., 2020; Hilmersson & Johanson, 2020; Zhu et al., 2019). He et al. (2020) emphasized the role of networks for a firm's internationalization venture, and demonstrated how a firm benefits from advantages like enforcing contracts, venture citizenship, access to industrial expertise and skills, access to network information, entrepreneurial processes, and entrepreneur-social relationships. He et al. concluded that international networks can accelerate internationalization processes because they are central to building international entrepreneurship, competences, opportunity identification, and streamlining managers' behaviors to the value-chain norms.

Atac (2005) considered networks as one of the critical resources a manager must use and take advantage of. Stachová et al. (2019) emphasized that firms from developing economies would significantly benefit from international networks because of their unstable domestic operational environments and distortions. The undeniable role of international networks characterizes firms to tap, develop, and possess formal business networks, social based networks, information networks, and institutional networks (Andersson et al., 2018; Stachová et al., 2019; Su et al., 2020). In view of this study

therefore, the concept of tapping into international networks remains relevant to firm internationalization, and blends well with functional capabilities' development to sufficiently expand into global markets (Sanyal et al., 2020b).

### **Resource-based View Theory**

Proponents of the resource-based view (RBV) theory upheld a view that firms go international because of their own resource prowess, uniqueness, and capabilities (Ramon-Jeronimo et al., 2019; Saeed & Ziaulhaq, 2019). Alon et al. (2021) and Lee et al. (2019) observed that firms which own unsustainable, tangible or intangible, and inimitable resources have potential to craft an international competitive advantage strategy; they have potential to appropriately combine their resources, transactional competences, and the mastery of their unique environmental and historical contexts to favorably operate in international markets (Alon et al., 2021; Ding et al., 2021; Lee et al., 2019). A similar view was fronted by Khan and Lew (2018) when they argued that a firm can gradually build an adequate competitive advantage to operate internationally if it has valuable, rare, inimitable, organizationally attached (VRIO framework), and substituteless resources (Chatzoglou et al., 2018; Elfan-Kaukab et al., 2020; Khan & Lew, 2018).

Ding et al. (2021) confirmed that the VRIO framework is sustainable because of an enduring heterogeneity of resources between competitors, for instance, the networks, the goodwill, the physical and financial resources, and the organization's production processes. These resources must have significant value advantage better than the competitors. Ding et al.s' view was echoed by İpek (2018) and Azman et al. (2021) when

they acknowledged that firms owning unique resource-bases can confidently go international; they can potentially foot the costs involved and absorb uncertain and risky shocks along the process. In this study, whereas resources are quite important and critical in developing the capabilities needed to serve the target markets, they must be capped with appropriate deployment decisions and strategic resources-combinations to maximize a firm's bargaining power.

Given the own-resources mindset as a springboard for developing an internationalization strategy, proponents of the RBV appeared to have sidestepped the contemporary realization that to serve a market satisfactorily firm's management must first understand it's needs. RBV theorists premised their arguments on a view that internationalization is triggered by push factors within the firm, for instance, firm resources, entrepreneurial mindset of management, strategy formulation, and strength of management team.

### **Born Global**

Theorists behind the born global (BG) theory characterized firms which are young, knowledge and innovation focused, technologically based, and have rapidly exploited international transactions during their infancy stages or within the first three years of their inception as BGs. BGs are able to achieve 25% of their livelihood from international transactions (Dzikowski, 2018; Weerawardena et al., 2019). Dabić et al. (2020) argued that firms go international earlier or at inception because they are triggered by the pull and push factors (globalization pressures, host countries attractive markets, home country market pressures, and advancements in technology). Paul and Rosado-Serrano (2019) and

Wadeson (2020) emphasized that for a firm to succeed as a BG, it has to master the international markets' knowledge, the general international business practices, and or the relevant networks for the nature of business. This view confirms Atac's (2005) BMS applicability to internationalization given the criticality of networks and information resources in building the firm's capabilities.

Caputo et al. (2022) argued that BGs can accurately curve out their market targets or niches outside their domestic markets, for which, they incur low adaptation costs and low communication costs. Emeterio et al. (2020) explained the BGs' ability to identify target markets because of advancement in web and other cyber communication technologies. Success in identifying appropriate target markets enhances BGs' abilities to incur low transportation, distribution, and local-business-culture citizenship costs; especially if they can garner the required capabilities to effectively attenuate the foreignness and newness liabilities (Gruber-muecke, 2018). To characterize BGs further, Ferguson et al. (2021) noted that they experience higher employment rates, have a high turnover, and they are not specific to an industry. In Atac's (2005) BMS theory, the theoretical lens of this study, segmentation and niching are critical market approaches to building the requisite global expansion strategies. Any entrepreneur can position their market and operational perceptions towards BGs in as long as they can harness the right mindset and can acquire the assimilative virtues that are considered relevant.

### **Born Again Global**

Born again global (BAGs) theorists observed that BAGs are mature long serving firms in the domestic markets that eventually go international, hence the expression born



again global or re-born global firms. BAGs respond to a disruptive incident, challenge, or may undergo managerial generation changes, and they may not have traces of attempted internationalization before (Cabral et al., 2020a). Saulich and Wohlgemuth (2018) observed that BAGs experience a critical change like new management, buy outs, or even their networks, which exerts pressure to operate beyond their domestic markets. Morais and Ferreira (2020b) explained that a situation as simple as a firm's customer migrating to another country may trigger it to follow them, hence born-again global.

Metsola et al. (2020) popularized the changes in management as potentially responsible for the creation of BAGs' related internationalization. Usually, new managers have international appreciation virtues, which may be caused by their previous experience and involvement in international frameworks like studies, employment, and a long-term pre-meditated international ideals. Morais and Ferreira (2020b) appeared to concur with Metsola et al. because they explained that management has a significant influencing effect on creation of BAGs based on their long-term views on internationalization. Paul and Rosado-Serrano (2019a) explained that new managers may look at internationalization as a long-term project whose returns would be realized after a long-term frame than a short one. Morais and Ferreira further observed that when new managers join the enterprise they get bored by the status-quo including operating in the domestic market; they would, instead, opt for encountering more challenging markets thus triggering the internationalization strategy.

Paul (2020) observed that managers' long-term perspectives for internationalization are constituted by time (speed of the process), scope (number of

destination markets to operate), and scale (proportion of the foreign sales to domestic ones). García-Canal et al. (2018) concluded that BAGs are more likely to be created through a change process; changes may originate from internal or external environments, and these may trigger either a BAG's accelerated internationalization or subject them to external influences. BAGs can be a potential pathway for internationalization of a firm; however, a myriad of factors must support the rebirthing of international markets' perspective, and managers must have the requisite knowledge, experience, and intuition to develop a strategy that can trigger internationalization.

### **Summary**

Firm internationalization has been opined from three perspectives to date; they include the stages perspective based on continuous organization learning and innovations, the networking perspective which focuses on building relationships and obtaining a position in the network, and the internationalization entrepreneurship focusing on the enterprising behaviors of the firm and its management (Morais & Ferreira, 2020a). Practitioners need to know that although these models have unique prepositions, they may not be sufficiently independent to drive a firm's internationalization agenda; instead major building blocks and pillars from a combination of them may reinforce each other for effective and rapid results (Andersson et al., 2018; Kujala & Owusu, 2021).

Theorists, who pioneered the endogenous drivers of cross border transactions, argued that a firm will engage international transactions after attaining a certain level of productivity, innovation, and built internal dynamic capabilities. Such firms are likely to

cover their incurred fixed and variable costs, including sunk costs related to the internationalization venture (Morais & Ferreira, 2020b; Priyono et al., 2020). It should be noted that internal dynamic capabilities of a firm are instrumental to the network theory because it drives the firm's innovativeness and adaptation of the network's knowledge to its functional agenda (Ode & Ayavoo, 2020; Simao & Franco, 2018). Pursuing the network model (collaboration, dynamic capabilities, and resource endowments), a firm must be keen on learning what happens in the network, yet learning is a key tenet of the stages-model (Uppsala model). In the international entrepreneurship perspective, a firm must focus on the critical role of resources including the managerial resource, yet resources-view is a key tenet of the network model (Saridakis et al., 2019a).

Internationalizing firms need to conceptualize and tailor hybrid lenses to their unique contextualities for rapid results because there is no single theoretical underpinning that is adequate enough to provide a template for firm internationalization (Priyono et al., 2020; Sanyal et al., 2020b). Imagine if two internationalizing firms were operating on different nodes along the same value chain, where one participates in downstream activities while the other participates in upstream activities, that is, a B2B business model; whereas these firms maybe involved in international transactions of the same value chain, their paths may be different, resulting from the various regulatory laws for different countries (Elia et al., 2019).

It is impossible for such polarizedly positioned firms to follow a similar internationalization template to achieve the same speed, scope, and build institutional competences (Prashantham et al., 2019) because they fundamentally make

heterogeneous decisions. Thus, an internationalizing firm ought to orientate its agenda onto the most relevant model given its operational, managerial, and environmental realities; a hybrid of several of the extant theories would seamlessly deliver spontaneous, better, and sustainable results.

### **The SME Internationalization Models**

Business sectors in developing and low developed economies in Africa are constituted by micro, small, and medium enterprises interpreted as SMEs for this study. SMEs play a vital role in developing global economies especially the developing and emerging economies of Africa, Asia, and Latin America; they contribute to their countries' employment growth and innovations (Abisuga-Oyekunle et al., 2020; Chege & Wang, 2020). SMEs are characterized by inadequate firm size, low resources base, low capabilities, low economies of scope and scale, and usually ran by inexperienced management with inadequate international managerial knowledge (Chandra et al., 2020; Mendoza, 2020). However, SMEs offer several advantages like flexibility in decision making, entrepreneurial dynamism, motivation, transactional agility, and quick to adapt to the internationalization mindset (Abisuga-Oyekunle et al., 2020; Chege & Wang, 2020).

A lot of literature, theories, and concepts of firm internationalization have been developed, and so many research pieces are still under way trying to establish the most appropriate and viable theories to address SME internationalization. I flagged several of them including: the international new ventures (Khan & Lew, 2018), the extended network theory (Khan & Lew, 2018), the Stage model (Hanify et al., 2019), and the

business strategy approach models (Deakin, 2019). Others are knowledge-based view and management (Khoury et al., 2021; Schwens et al., 2018), learning and innovation adoption models (Hanify et al., 2019), the competence-based competitive strategy (Hanify et al., 2019), the opportunity-based view (Hanify et al., 2019), and social learning theories (Niittymies & Pajunen, 2020).

### **The SCOPE Theory of SMEs Internationalization**

Paul (2020) theorized his internationalization approach onto the potential for SME managers to craft an appropriate strategy by analyzing the firm's challenges, opportunities, and problems (SCOPE). Rakshit et al. (2022) argued that an SME can penetrate, participate, and operate sustainably in global markets if conducted thorough target market studies, assessed its internal capabilities, and studied its domestic and proposed external markets line industry. Rakshit et al. focused more onto the improvement of an SME's global expansion strategy as the main objective of the SCOPE model. Paul and Mas (2020) still emphasized the role of strategic doughtiness to internationalization, and suggested a typological approach modelled on a 7-P theoretical framework.

### **The 7-P Theory for SME Internationalization**

Proponents of the 7-P theory of internationalization recognized that enterprise managers must observe the role of the process, the path, the potential, the pattern, the problems, the pace, and the performance of the firm for a successful international venture. In their submission, Chen et al. (2020) argued that a manager is attracted to international markets to achieve either of the two things, that is, (a) to explore and exploit a potential

market or (b) to access better resources and improve the competitiveness of an enterprise. To successfully venture into international markets for whichever reason, a manager must adapt a detailed planning of the process, the path, the potential, the pattern, the problems, the pace, and the performance of the firm (Liñán et al., 2020). Paul (2020) and Liñán et al. (2020) argued managers to craft success-focused strategies for their internationalization agendas after they have critically analyzed the various dimensions of the 7-Ps for better informed and intelligent decisions. Several of these seven propositions appeared to cut across all internationalization theoretical models; Paul and Mas (2020) made similar observation when they noted that successful firm internationalization is highly linked to the firm's ability to address the where, the what, the how, the who, and at what speed of approach.

### **The CPP Theory for SME Internationalization**

Paul and Sánchez-Morcilio (2019) developed the conservative, pacemaker, and predictable (CPP) theory for firm internationalization. These theorists explained that a firm can be prompted to internationalize if it is sure that its domestic cultural, administrative, geographical, and economic (CAGE) environment is closer to its international market target. These experts opined that managers of SMEs should identify and look for business opportunities from predictable international environments; the predictability is associated with the similarity of legal environments of the two markets, and these could be belonging to the same regional grouping or trade block, hence close administrative distance (Liñán et al., 2020). Management, with the CAGE mindset, takes

a slow approach to internationalization because they imagine an enormous psychic distance (Casprini et al., 2020).

Paul and Sánchez-Morcilio (2019) explained that some SME managers will trigger their internationalization efforts after inspirations from a pacemaker firm; such a firm integrates into international markets at a significantly high speed and shorter time frame like the BGs. The pace of international entry has become apparent to participating firms because of the technological, managerial, innovation, and knowledge creation advancements in the contemporary global business environment (Liñán et al., 2020; Paul & Sánchez-Morcilio, 2019).

### **Corporate and Individual Global Mindset**

Global Mindset (GM) theory, also referred to as a transnational mentality, focuses on an adaptation of a managerial mindset that appreciates the differences that exist in culture, practices, managerial processes, and openness to polycentrism as a framework for developing a firm's competitive advantage in international markets (Galhanone et al., 2020; He et al., 2020). Nambisan et al. (2019) observed that business environments, opportunities, and how to exploit them varied across nations, and for a manager to penetrate these markets they must possess a combination of strategic complexity (long-time survival of the firm) and cultural complexity.

To Nambisan et al. (2019) and Niittymies and Pajunen (2020), strategic complexity allows the manager to develop a firm's competitive advantage in foreign markets by providing for interests of a wider spectrum of stakeholders; while cultural complexity facilitates managers' appreciation of the differences of operational

environments between countries, and therefore, smoothens implementation of the strategy. To develop a global mindset therefore, managers must possess or acquire a cognitive structure capable of discerning strategic environmental and operational differences between countries.

He et al. (2020) emphasized that GM must be embraced as a managerial requirement in internationalization because of its critical role in facilitating managers to overcome a repertoire of complexities synonymous with international markets; managers can develop internationalization entrepreneurship skills, access and analyze information about international markets, and GM acts as a backdrop for knowledge engineered activities. Kwiotkowska (2020) argued that for a firm to internationalize through the GM model, both individuals' and the organization cultures must embrace the GM as a framework for building and implementing a firm's competitive advantage in foreign markets. To embrace GM successfully, Kwiotkowska identified several attributes including: analytical posture, aggressiveness, ability to take risk, strategy prowess, while individual attributes included cognition, behavior, and knowledge; these attributes can successfully drive a combination of corporate global mindset (CGM) and individual global mindset (IGM).

### **Theoretical Foundation of the Study**

In the section, the goal is to present the theoretical foundation of the business management systems (BMS) theory to the internationalization functionalities of SMEs. The theoretical foundation acts as a lens through which a researcher focuses and conceptualizes the phenomena of study (Niederman & March, 2019); it must have



identifiable constructs that are falsifiable and whose relationships are specific (Niederman & March, 2019; Paul, 2020a).

### **The Business Management Systems Theory (BMS)**

The theoretical foundation of this study is the BMS. Atac (2005) developed the BMS theory, which grew out of a study of developing and managing a competitive enterprise with optimal bargaining power to serve and dominate any targeted market. Atac emphasized the role of a manager to identify, develop, and coordinate the various components of a business from the management and business wings of an enterprise.

Atac (2005) explained that managers have at their disposal, resources like information, physical resources, financial resources, human resources, and networks (a manager can own these network resources or for the business) at their disposal; managers can deploy these resources to develop critical tasks in production and marketing (business functions). A manager must craft a strategy based on making right decisions on the quality, quantity, time, and cost of these resources for every critical task. The resulting product dimensions (quality, quantity, time, and cost or QQTC) remain consistent with the needs identified in the market (i.e., the core need, expectations, purchasing habits, and buying occasions or the NEHOs). Atac explained critical tasks as the production mechanisms a manager must put in place to configure and produce a product/service that possess the features that are consistent with what the target customers are expecting.

Atac (2005) explained that critical tasks are determined through positioning or synchronizing the target markets' needs and the potential product. The product must possess those features or dimensions, which can potentially address and satisfy the needs

list of the target market. For each of the product dimensions that have been identified, the manager must determine the critical tasks that must be developed to produce those product features or dimensions to synch with the needs of the target market. Like Atac, Dhir and Dhir (2018) asserted that if managers could develop the appropriate critical tasks, they would have made their businesses competitive and capable of satisfying and dominating their target markets (Dhir & Dhir, 2018).

According to Atac (2005), managers are pivotal in laying strategies for critical tasks development in a well-functioning business because they must plan (determining the QQTC), acquire, and deploy the resources needed for each task. Managers are expected to execute (acquiring and allocating the appropriate resources) and control through monitoring performance and taking corrective actions. Atac further explained that apart from managing the developing of tasks (capability cycle), the manager must lay strategies to manage a cycle where money is made, that is, the transaction cycle (getting orders, fulfilling orders, and getting paid).

A manager has three cycles to concentrate on to build a competitive business (Atac, 2005). First, is the strategy cycle where a manager identifies the market needs, configures the ultimate product or service which can address the demand dimensions identified in the market (Gkypali et al., 2021). Second, is the tasks development cycle where a manager determines the various production and marketing tasks the enterprise must have to produce the identified product dimensions (QQTCs) and to serve and satisfy the target market's identified needs (NEHOs). Third, a manager must focus on the

transaction cycle as a means of getting orders from potential customers, fulfil those orders, and then get paid (Ghauri et al., 2021).

Atac (2005) asserted that all these cycles are mutually exclusive and collectively exhaustive. For instance, while fulfilling the transaction cycle, the production capability is tested in fulfilling orders, and the marketing capability is tested in getting orders. The manager's competences are tested by the rate at which the transaction cycle is completed because getting paid indicates manager's ability to balance the working capital requirements of the enterprise. Atac explained that most challenges businesses experience are symptoms of problems rooted in managerial decisions on critical tasks choice, resources identification and acquisition, and the efficacy of resources deployment mechanism. He et al. (2020) and Conboy et al. (2020) also observed that optimal resources identification and deployment plus transformational capabilities development could be achieved if managers appreciated and practiced real time information analytics along the upstream and intra-enterprise value chain.

If managers could master their decisional roles (managerial competences), they would develop effective operational strategies (segmentation, targeting, positioning), which would enhance their enterprises to produce the right product for the right market (Abubakar et al., 2019; Ng & Kee, 2018). Atac (2005) concluded that an effective operational strategy enables a business to maximize its bargaining power; while Chatain and Plaksenkova (2019) argued that with maximized bargaining power, a business possesses the requisite export competences, and can ably benefit from internationalization (Chatain & Plaksenkova, 2019).

By advancing the bargaining power concept, Atac (2005) referred to the ability of an enterprise to determine key functional components of production. With this he meant that suppliers of raw materials, for instance, would only supply the required quality and quantity of inputs at the right costs and time. Ultimately, the enterprise would transform these inputs into the appropriate product that is desired by the target market, thereby determining product price (Atac, 2005; Victor et al. (2019). However, Prasad et al. (2019) explained bargaining power as a market-imposed relationship in which participating parties demonstrated their ability to cause and determine how transactions should happen. Market imposed relationships can result into benefits, constraints, and minimal gains between negotiating parties (Prasad et al., 2019).

Atac's (2005) BMS theory aligns well with the current study which seeks to explore the strategies that managers of SMEs must craft to achieve global expansion, so that if they build their businesses' tasks they would be in position to participate in international transactions. Developing the business functions' tasks improves an SME's bargaining power towards its suppliers and consumers (Cho et al., 2019). Atac asserted that by optimizing bargaining power an enterprise can become a competitive monopoly; Barney and Mackey (2018) advanced a similar view that an enterprise can build for itself monopoly-like powers in the market by building valuable, rare, imitable, and organized internal capabilities (VRIO) (Barney & Mackey, 2018). In their study, Cho et al. (2019) discovered that there existed an imparity relationship between a firm and its suppliers, customers, and chain players because it possessed unique resources and capabilities.

### **Key Tenets of the BMS Theory**

In this section, explanations include some of the key terms that BMS theory uses and how other theorists have applied them into their contextual studies of internationalization. Atac (2005) theorized a business as having three wings, that is, the business wing, which constitute functions of marketing and production, the management wing, with which management makes decisions on actions that are applied to business wing components. Atac explained that the two wings are linked by a strategy (segmentation, targeting, and positioning), with which management determines the appropriate marketing and production capabilities they must develop to have a competitive business. Once management identifies the appropriate functional capabilities, then it engages the resource allocation and performance monitoring to produce the product with the right dimensions as expected by the target market.

### ***Management Cycle***

Atac (2005) emphasized that for management to nurture a competitive enterprise, it must develop an appropriate strategy for right resources identification and deployment decisions. I noted that Popadiuk et al. (2018) extended Atac's argument beyond nurturing a competitive enterprise through making right decisions on resources to adapting an ambidextrous approach. To be ambidextrous, management must build and exploit their internal capabilities, and seek to explore opportunities offered by both domestic and international markets. Cabral et al. (2020) and Santoro et al. (2021) appeared to agree with Atac's assertion as they concluded that managers are critical to building the firm's entrepreneurial capabilities, the strength of which determines the competitiveness of a

firm in its network. Building the competitiveness of an enterprise is a clear manifestation of developing unique internal resources and capabilities that can propel the enterprise to identify, penetrate, and serve both domestic and international markets.

Gancarczyk and Gancarczyk (2018) argued that for a firm to competitively operate in international markets, it must have adequate, inimitable, and non-substitutable resources to absorb associated risks, the eclectic uncertainties, and operational costs. The Gancarczyks and Chandra et al. (2020b) explained that most SMEs can ably acquire unique resources like knowledge, managerial savvy, networks, reputation, and entrepreneurial capabilities if their managers adapt a proactive approach to management. Sánchez-Gutiérrez et al. (2019) categorized the firm's resources as intangible and tangible, so for SMEs to build sustainable competitive advantages they must build and exploit their inimitable and tailored intangible assets. Following Atac's argument concerning the manager's role in building a competitive firm and its subsequent ability to identify, penetrate, and serve targeted market segments, implied assertions include that a competitive firm can ably penetrate and serve international markets.

Breuillet et al. (2022) contended the resources endowment argument as a propeller to SME internationalization, they explained that some adequately endowed firms do avoid internationalization participation because they perceive such ventures as costly, unprofitable, and requiring large fixed costs. Several internationalization researches demystify resources as the arch driver of a firm's internationalization ventures, for example, Alayo et al. (2019) and Sanyal et al. (2020a) identified the managerial character and entrepreneurial prowess as an engine behind firm internationalization. Dar

and Mishra (2019) plus Petrou et al. (2020) focused on the internal environments of SMEs, specifically the managerial savvy, as pointers to choosing an adaptable internationalization strategy, and the ability to make accurate strategic decisions as the driver of internationalization. In this study, therefore, the goal was to maintain being managerial savvy to build a sufficient operational strategy that can serve the identified international market's needs, satisfactorily.

### ***Strategy Cycle***

According to Atac (2005), enterprise managers craft operational strategies with which they determine the critical tasks, processes, and capabilities a firm must engage to produce for the target market. Atac argued that the operational strategy is intended to develop production capabilities whose transformational processes would create a product with the right dimensions (QQTC). These QQTCs must synchronize with the target markets' needs (NEHOs), appropriately. Following the same argument, Efrat et al. (2017) explained that a firm should develop adequate capabilities to identify and convert target customers' consumption related ideas into appropriate and satisfying products. Developing adequate enterprise capabilities imply that a firm can ably synchronize target markets' demand features with the appropriate product dimensions so that the QQTCs equal to NEHOs.

Magnani and Zucchella (2019) appeared to emphasize Atac (2005)'s strategy cycle, as they explained that an SME, with a paucity of resources, must engage accurate inward and out-ward strategic decisions to overcome numerous challenges and uncertainties synonymous with international markets. In a more recent SME

internationalization study, Franco and Martins (2020) emphasized the role of a manager to envision a market-production synchronizing strategy of their enterprise, and intuitively build the transformational capabilities for competitiveness. A plethora of internationalization scholars have emphasized the manager's role of building an operational strategy for successful market penetration and servicing. Managers, therefore, must define the actual businesses of their enterprises, that is, producing 'what' for 'who'.

A proper definition of the business provides a precise reference for managers to craft accurate operational strategies for their enterprises, so that businesses produce and serve their target markets with appropriate products. Krishnan and Ahmad (2019) explained how precise definition of the business (positioning) of an internationalizing SME, through designing a value proposition that harmonizes the potential customers' interests, needs, expectations, and consumption practices, could lead to massive product acceptance. Thus, in this study the intention was to explore the possibility of having an accurate operational strategy, in which, management synchronizes the NEHOs of an international target market with relevant product / service QQTCs as a recipe for internationalization (Franco & Martins, 2020; Magnani & Zucchella, 2019).

Because strategy development involves identifying and commissioning of relevant resources and managerial commitment, readiness for international ventures becomes a critical input factor for firm internationalization (Gerschewski et al., 2020). BMS, therefore, does not make any distinction between domestic and international transactions; it is upon the manager's shrewdness to identify the differences in resource,



managerial, and capabilities for the three cycles and make focused and accurate decisions about the resources needed (Atac, 2005).

### ***Business Wing Cycle***

Atac (2005) argued that an enterprise consists of a mutually exclusive section where products and services are configured; and management interfaces with the target market to determine the market's needs. Atac explained that for an enterprise to synchronize its target market's demands with its product offer, it must develop a mechanism of studying the target market's NEHOs; then configure the product dimensions or QOTCs that address the NEHOs, perfectly. Atac categorized the aforesaid mechanisms as production and marketing capabilities, which he labelled as the functions of business. In agreement with Atac, Westerlund (2020) emphasized the role of excellently developed business capabilities in driving SMEs to internationalization and attraction into global supply networks. On the other hand, Gerschewski et al. (2020) identified the ability of an enterprise to adapt to customers' preferences in international markets as a key strength for SMEs' internationalization.

**Business Functions.** Atac (2005) urged that a business has two functions; the production and marketing functions, which define *what product* and *for who*. Mudalige et al. (2019) shared a similar view of production and marketing functions of a firm, and urged managers to have total control over them to ensure meaningful flexibility in creation of evolving customer value. Pasamar et al. (2019) recognized the criticality of production and marketing components of a business towards achieving the efficiency and innovativeness respectively. A firm's ability to innovate and create the target markets'

needs-satisfying products leads to an enduring market acceptance, performance, and potential market domination (Makaya et al., 2021).

**Capabilities.** Atac (2005) defined capabilities as mechanisms the manager must put in place to have a functional and competitive enterprise. Atac identified three categories of capabilities; the production function capabilities, with which the firm can produce the right QOTCs; the marketing function capabilities, which enable the firm to communicate, distribute, and identify needs of the target market. The third category is the transaction cycle capabilities, which enable the manager to solicit, get, and fulfil orders from the market, and then get paid. Khan and Lew (2018) explained firm capabilities as the ability of a firm to configure routines, resources, and operational combinations to achieve its production and marketing goals. Gupta and Chauhan (2021) and İpek (2018) looked at firm capabilities as marketing, production, networks, innovation, and organizational learning; these capabilities bind the firm's resources together to collectively create value, improve its export performance, and adapt to the dynamic international business environment.

Camisón-Haba et al. (2019) considered firm's capabilities as a managerial efficacy to manage its resources, a contending view against Atac's (2005) explanation. Silva-Luiz (2020) explained that if a firm can replicate, expand, and modernize it possesses significant managerial strength to leverage the evolving business environment. Other theorists presented a priority list of capabilities that a manager must possess in order to build a firm's competitiveness to counter external and internal challenges (Camisón-Haba et al., 2019; Slaouti, 2021). Luca and Giua (2020) concurred with Atac's

argument that managers should exploit non-traditional network-based resources and the unique industrial characteristics to upscale the firm's capabilities. Luca and Giua argued that if a firm participates in an international network, it can easily access the network's unique nontraditional resources and leverage them to build adequate capabilities and inimitable competitive advantage.

Bacq and Eddleston (2018) theorized enterprise capabilities as the intrinsic ability of an enterprise to plan, acquire, and coordinate the enterprises' tasks it has to perform. If an enterprise possesses the right human resources, the relevant board of directors, and the appropriate financial and physical resources, it has the right capabilities and technical abilities; with such capabilities, a firm can adopt evolving best-practices. Sani et al. (2019) contextualized enterprise capabilities as the firm's ability to re-orientate, reconfigure, build, and integrate its external and internal resources to address and adapt to the volatile, unstable, and evolving business environment. Sani et al. emphasized that it's not about the uniqueness and litany of resources an enterprise possesses, but the nature of managerial practices and activities applied to them to develop the firm's capabilities.

Tartaglione and Formisano (2018) also supported by Falahat et al. (2020), explained the various perspectives of enterprise capabilities. To them, a firm can possess capabilities of performance of a specific function or task and capabilities of cognition or peoples' knowledge to articulate and deliver on the tasks. They also related organization's capabilities to the actions or routines, accompanying processes, the scope and direction of decisions, with which enterprises related to actions (Falahat et al., 2020; Tartaglione & Formisano, 2018). From the on-going discussion, therefore, Atac (2005)

seems to have implied and premised capabilities, in his theory, onto enterprise performance.

To build firms' capabilities, a manager need to develop and verify an operational strategy, identify the relevant critical tasks and resources to facilitate the tasks.

Capabilities' building view is supported by many other theorists whose wide ranging perspectives included the role of the firm's unique resources in building, accessing, and constructing its sustainable competitive advantage (Dabi et al., 2020; Morais & Ferreira, 2020b). Silva et al. (2021) explained that if a firm built adequate, inimitable, non-substitutable capabilities, it enhanced its resilience and endurance to the volatile operational environment; a firm could acquire this through a learning-innovative-adaptive model. Handoyo et al. (2021), Freixanet and Renart (2020b), and Falahat et al. (2020) identified several enterprise capabilities that managers must develop to facilitate internationalization and subsequent market performance. Such capabilities included networking, innovation and risk taking, marketing, market communication, dynamic capabilities, and international experience.

The contextual interpretation of capabilities in this study, associates with tasks or functional performance; a view also embraced by Riquelme et al. (2021). This position should invalidate all definitional inconsistencies, contradictions, and overlaps embedded into the term (Lee et al., 2021). The choice of the functional performance perspective for enterprise capabilities contextualizes the concepts of competitive advantage, strategy crafting, plus enterprise learning and adaption, which are critical in the firm's

internationalization efforts. I discussed and expounded on them in the subsequent reviewed literature paragraphs of this doctoral study section.

**Critical Tasks.** Atac (2005) argued that to make the capabilities functional, a firm must engage appropriate tasks, for which a manager must make accurate decisions on planning, acquiring and allocating resources to them, and monitoring progress. In line with Atac's tasks' view, Lwesya (2021) argued that the firm's competitive advantage is derived from the manager's ability to select, allocate, and coordinate resources that are needed to produce and serve a given market; failure to do so signals underperformance or lack of certain capabilities (Lwesya, 2021). Picken (2017) used the Olympics' octagonal hurdle allegory to explain and highlight the importance of critical tasks; Picken emphasized the responsibility a manager has to ensure excellent performance of a firm in all tasks to realize competitiveness. Conclusions include that a competitive business must identify critical tasks, which could be the actions to be performed on resources and the decision-setting mechanism a manager must institutionalize.

**Critical Resources.** According to Atac (2005), the critical tasks must be supported by the appropriate critical resources to build a competitive enterprise; he identified human personnel, physical assets, information resources, financial resources, and the networks that an enterprise or management possesses. Several studies have recognized the criticality of resources in building a competitive enterprise (Behl, 2022; Bloodgood, 2019; Lafuente et al., 2020). Researchers demonstrated the need to adapt a business model, which provided for better resources planning and implementation.

Deakin (2019) and Bashir and Farooq (2019) emphasized that a firm's business model must provide for the customer value proposition and the corresponding critical resources to create it. Delivering the customer value proposition, as expected by the target market, require a firm to build the requisite capabilities in marketing and production, and accessing resources that can enhance the growth and expansion of the firm's activities into international markets (Sánchez-Gutiérrez et al., 2019). Păunescu and Argatu (2020) and Riquelme et al. (2021) argued managers of enterprises to continuously assess their critical resources and capabilities, and monitor them for agreeable quality standards to consistently address their target markets' expectations. The manager of an internationalizing firm, therefore, must identify the critical tasks, critical resources, and develop exquisite capabilities to satisfactorily address potential customer needs in the target market.

***Competitive monopoly.*** Atac (2005) identified competitive monopoly as an outcome of strategic efforts that a firm attains after subjugating and dominating its competitors in a market segment. Atac explained that a firm can become a competitive monopoly through effical market segmentation and product positioning, that is, calibrating a product with features that reflect the target market's needs. Horvathova and Mokrisova (2020) asserted that the business can attain competitive monopoly, if it creates the right product, offer it at the right time and place, and efficiently satisfy all the target customer's expectations better than the competitors.

Asiaei et al. (2021) demonstrated that a firm can achieve a competitive monopoly status, if it can orchestrate its resources, management, networks, and other assets to create

an inimitable heterogeneous product characteristic through constant innovation. Atac (2005) observed that if an enterprise becomes a competitive monopoly, it can monopolize the sources of supplies, the distribution channels, and continuously innovate to improve its product features. While Teece (2018) concluded that a competitive monopoly firm is capable of adapting to the evolving business environment, and rapidly respond to snapshots (threats and opportunities) in its environment as it builds long term efficiency and efficacy. An internationalizing firm, therefore, must build capabilities to sustainably withstand, wither, and confront the volatility and uncertainties in the international market environment, while exploiting the unfolding advantages (Mudalige et al., 2019; Sanyal et al., 2018; Teece, 2018).

**Risks and Uncertainty.** Atac (2005) explained risks and uncertainties as challenges, variations or fluctuations, which a manager will encounter at the strategic, activity, and operational levels of enterprise management. Bonfim et al. (2018) and Handrito et al. (2020) argued that an internationalizing firm should prepare for additional risks and uncertainties which are inextricable to external markets and pose completely different challenges from those in the domestic markets; countering the risks and uncertainties require persistent and risk-taking behaviors contextual-able to an international setting. To overcome risks and uncertainties, therefore, a manager must oversee how tasks are managed (task content), shrewdly predict, plan, and manage the various complexities that come along with an internationalization venture (Etemad, 2018; Lahiri et al., 2020; Vallone et al., 2019).

Internationalizing enterprises encounter several categories of risks and uncertainties including individual risks (business partners, credit, and contract risks), market risks (economic, price related), and country risks (economic, socially oriented, and political risks) (Eduardsen & Marinova, 2020). Handrito et al. (2020) and Chandra et al. (2020) asserted that risks increase inextricably with internationalization, demanding an objective projection and mitigative measures to the managerial approach. This should adopt measures like international commercial and shipping terms (INCOTERMS and COMBITERMS). Cuervo-Cazurra et al. (2018) observed that even with growing international experience and managerial practicality, uncertainties can still surface with counterproductive effects. These can significantly impact on the managers' aggressive commitment and involvement in the internationalization processes.

In the earlier theorization of internationalization, uncertainty was attributable to lack of knowledge of the new potential markets, however, when proponents conceptualized the gradual, small step, incremental internationalization, it gave a chance to management to eradicate their naivety (Hultman et al., 2021). Progressive research in internationalization identified the state of outsider-ship from a relevant international network, which would be minimized by acquiring knowledge about these networks. Network knowledge would reduce the managerial alienation from internationalization uncertainties; and propel them to commit to international ventures (Lagerström & Lindholm, 2021).

In attempting to locate the nidus of uncertainty and risk, Atac (2005) asserted that risk is significant for both domestic and international transactions at the operational



strategy development level than at transaction cycle phase; while uncertainty appeared to be more stable across the three managerial cycles (strategy, capability, and transaction). Atac's assertion implied that an enterprise would continuously interface additional risks and a variety of uncertainties along its internationalization journey (Etemad, 2018; Vallone et al., 2019), for which a firm must plan during strategy conceptualization and planning.

### ***Transaction Cycle***

Atac (2005) explained that a manager's capability is tested during the transaction cycle, as it involves tasks that make possible the enterprise's ability to get orders, to ship orders, and to get paid in time. In the transaction cycle, tasks in the production function are tested by the ability of an enterprise to fulfil orders; yet tasks in the marketing function are tested by the ability of an enterprise to secure orders from the targeted market. But also, manager's competence is tested by their ability to maintain adequate working capital if they can get payment from their fulfilled orders in time.

**Order Fulfilment.** Vasconcelos<sup>1</sup> et al. (2021) and Zawislak et al. (2018) appeared to concur with Atac's (2005) assertion of the criticality of transactional components like order fulfilment in building a competitive enterprise. They emphasized that an enterprise must be capable of delivering the right quantities of a product at the customers expected time and place. Noori-Daryan et al. (2019) observed that fulfilling orders and key promises in the product purchase agreements, was critical to harnessing customer loyalty and strengthening customer relationships. An internationalizing enterprise, therefore, must develop efficient marketing tasks through which information

about customers' NEHOs can be channeled, analyzed, and processed in time; the capability of the marketing function's tasks should confirm managerial ability of fulfilling orders and getting paid.

Yu et al. (2017) looked at order fulfilment from a manufacturer-retailer-customer model, for which a manufacturing enterprise concentrates on producing while a retailer identifies potential customers. Yu et al. argued that their intermediary model required a strong collaboration between the retailer and enterprise for order detail clarity, processing, and fulfilment. Their argument puts the retailer at the forefront of identification and profiling of customer needs, getting orders, and collaborating with the manufacturing enterprise; while the enterprise must clearly conceptualize, configure, and transform the NEHOs into appropriate product dimensions for a competitive advantage. Rai et al. (2019) partially concurred with Yu et al.'s argument, as they proposed a bi-model approach to fulfilment of orders. Rai et al. explained that an enterprise will have two types of customers, that is, end-users and distributors; to fulfil the customers' orders a firm can adopt the dedicated distribution-center based model, from which orders are delivered to homes and stores, or the dedicated integrated model for fulfilling both online and in-store orders.

**Getting Paid.** Atac (2005) explained that building a competitive enterprise has direct implications on working capital requirements; delivering a required product to the target market involve a lengthy operating cycle (conversion processes), which may lock-up the working capital. Atac argued that managers of enterprises need to plan for adequate working capital availability, for the smooth flow of transformational processes

and timely delivery of products to their targeted destinations. Planning for adequate working capital, Oberle and Ponterlitschek (2019) advocated for careful negotiations, drafting, and conclusion of sales (downstream) and purchasing (upstream) contracts; the transactional contracts must address issues of cost traps, credit cycle, conflicts, performance, delivery and associated service scope, and other legal consequences. Carefully crafted sales contracts, therefore, will facilitate working capital flow through timely payments, avoidance of unnecessary costs, and effective performance of the contractual terms.

Study et al. (2021) explained that enterprise managers can plan for sufficient funds through an effective pricing strategy. Study et al. argued that while developing a pricing strategy, a manager must provide costs, comparative advantage, market trends, payment method, and current price, bearing in mind the competition. Khaskheli et al. (2017) appeared to complement Study et al.'s pricing strategy as they argued managers to consider the most efficient payment methods, through which customers can channel their payment timely. However, Khaskheli et al. caveated that whereas there are several quick ways of payment methods, including online channels, applications, M-commerce, mobile banking, and social-media linked alternatives, managers should be conscious of and strongly examine their security.

Dornel et al. (2020) proposed several working capital source alternatives available to the manager; for example, trade credit for which an agreement is made with suppliers for a longer credit cycle, trade credit insurance, reversal payment chain, and digitization of accounts receivables. Trade credit occurs when a manager negotiates for advantageous

credit terms with their supplies, especially the credit cycle, while reversal payment chain focuses on negotiated credit cycles with the value chain players (Akhilesh Chandra et al., 2018; Dornel et al., 2020).

Dornel et al. (2020) also explained the trade credit insurance as a potential source of working capital available to the manager. A manager may have negotiated good transaction contracts with customers, but miscellaneous factors may hamper timely payments, so the manager can approach credit institutions to fund the insured trade credits. Working capital shortages are a potential source of SMEs' funding challenges, and can trigger insolvency of an enterprise (Sah, 2021), therefore, managers must engage detailed planning with an objective of receiving timely payments and accessing other optimal financing sources.

### **BMS and Internationalization**

In this section, discussion includes proposed potential ways of how an internationalizing SME could use the BMS lens (see Appendix B). There was a gap in the literature about SME managers' perceptions towards developing business functions' tasks as a path to penetrate and serve international markets. Only a minimal number of studies focused on developing business functions' tasks (i.e., marketing and production), as an approach to developing a business's competitiveness in the target markets (Atac, 2005; Morgan et al., 2018; Tartaglione & Formisano, 2018). The BMS theory explained how identifying any market's needs (i.e., core need, expectations, habits, and occasions) could inform the configuration of adequate product dimensions that best satisfy those needs. Developing a product, which can satisfy the needs package of a target market, can be

achieved if a manager develops the appropriate production and marketing capabilities of the enterprise (Atac, 2005).

This study is using the lens of Atac's (2005) BMS theory to examine strategies that managers of value adding SMEs in Uganda use to expand into global markets based on their business functions' tasks development, and whether those tasks can adequately drive an internationalization agenda, sustainably. In the proceeding paragraphs, presentations included the potential approach to organizing the firm's strengths that could lead to internationalization.

### **Managerial Entrepreneurial Activities**

As a manager crafts the firm's operational strategy, they must decide the relevant resources required, that is, their quality, quantity, cost, timing, allocation, sources, and how they should be monitored for performance; this step sets in motion the innovative aspects of an SME (Abbas et al., 2019; Atac, 2005). Decisions taken on resources must be supported by a number of entrepreneurial activities to assist in planning, executing, and controlling them (Atac, 2005). İpek (2018) likened the process to a managerial resource-picking mechanism. Because making the right-resource decisions is such a complex process as different managers view available opportunities differently, it reflects managerial individual differences, experiences, and complexities, especially in the backdrop of resource constraints that most SMEs experience (Elbanna et al., 2020a, 2020b).

Managerial entrepreneurial activities, therefore, must reflect the nature and innovative behavior of an SME that is seeking to participate in international transactions

(Wrede & Dauth, 2020). In this study, the intention was to establish how my sample participant managers execute these activities, and the level of involvement they engage. If managers get deeply involved in these entrepreneurial activities, they can obtain a decisive level of commitment and analytical engagement, adequate enough, to adopt requisite strategies that could propel their enterprises into internationalization (De-Cock et al., 2021).

### ***Enterprise Competitiveness***

According to the BMS theory (2005), an enterprise is competitive if it has built production and marketing capabilities that can create a product whose features accurately address the demand characteristics of the target market, hence a perfect positioning (Atac, 2005). Bahl et al. (2021a) pointed out that an enterprise can become competitive if its management can accurately identify, acquire, and allocate resources guided by an adopted resource-pattern or strategy; this can potentially lead to SME internationalization. Arguments include then that if a manager can ably engage entrepreneurial activities they will succeed in capabilities development; this synchronizes the production and market's needs, thereby achieving perfect positioning in the target market (Heinberg et al., 2021). Once an enterprise is capable of achieving perfect positioning, it can venture into any market including international markets (Belboula et al., 2019).

### ***Production Function Capabilities***

The BMS theory defined production capabilities as those mechanisms that a manager installs to produce the desired QQTC dimensions of a product. These QQTCs must represent the product or service features expected by the potential market to achieve

needs satisfaction (Atac, 2005). Bhat and Momaya (2020) attributed capabilities development and their adequacy to the size of the firm; to them, SMEs are largely resource constrained and therefore would find it difficult to build requisite capabilities for international assignments. Mostafiz et al. (2019) looked at capability as a managerial virtue, with which management can identify international opportunities, re-orientate its production function and prepare it to exploit these international opportunities. Note also that as long as an SME developed the appropriate business tasks, it still can sufficiently serve a properly profiled market niche in domestic and or international market irrespective of its size.

### ***Marketing Function Capabilities***

In the BMS (2005), Atac (2005) postulated that developing marketing capabilities was key for a firm's superior competitive advantage; a firm must develop adequate distribution, communication, channel management, and pricing capabilities to serve the target market better than the competition available. Kaleka and Morgan (2019) vehemently supported this view; they asserted that if an enterprise has to enjoy superior performance and achieve effective differentiation and cost efficiency it must first develop its marketing capabilities. In agreement with Atac, Kachouie et al. (2018) and Martin et al. (2020) agreed that these marketing capabilities are deeply embedded in the firm's operational culture, they are inimitable, not easily substitutable, are scarce, and firm specific. Marketing capabilities can deliver adequate and accurate knowledge about the target customer to facilitate effective value creation and preposition (Kachouie et al., 2018; Martin et al., 2020; Morgan et al., 2018).

Marketing capabilities can contribute to a sustainable competitive advantage of the firm by enabling new product development and improvement, channel management, and customer relationships management (Cao & Tian, 2020; Kachouie et al., 2018; Martin et al., 2020; Morgan et al., 2018). Arguments include then that irrespective of the market domain an SME is serving, developing its marketing capabilities is critical for competitive performance. In this study therefore, developing marketing function's capabilities for successful internationalization is rightly placed, and more detailed discussions need to be engaged with industrial practitioners to investigate whether and how they have exploited marketing capabilities to advance their internationalization agenda.

### **Small and Medium Enterprise Internationalization**

After building all the requisite capabilities in business functions, management needs to serve the market segment for which it developed the customized product or service, and this involves getting orders from potential customers, serving them, and getting paid (Atac, 2005). This implies that management must develop transactional capabilities, with which it can solicit orders, service them, and get paid. Contemporary SMEs would not find this difficult because of the extant globalization efforts in every sector, which are supported by ICTs, Internet, new business practices like outsourcing, etcetera. (Kromidha & Robson, 2021; Teruel et al., 2021).

With an invention of Web 2.0, a platform that allows creation and sharing of information between users on social media, a lot of opportunities in the international business cyber space can be exposed; thus, internationalizing SMEs can easily transact



internationally (Meret et al., 2019). With the current rapid penetration of mobile technologies and mobile money transfers, which are being legitimized by countries, societies, and industrial sectors, SME managers just need to align their international payment aspects (Cassetta et al., 2020; Teruel et al., 2021). Given the current low cost approach (González & Sorescu, 2019) and the near zero holding costs, businesses are adapting the evolving practices especially in ICTs, and are building efficient transaction cycle capabilities, which would enhance the simplicity and ease of internationalization (Cassetta et al., 2020; Kromidha & Robson, 2021; Ooi & Richardson, 2019; Teruel et al., 2021).

### **Mapping the Study onto the BMS Theory**

Serving domestic and international markets satisfactorily, require an enterprise to develop a competitive advantage (Atac, 2005), and such advantages need not only be premised on company resources but a hybrid of factors (push and pull). A shrewd manager, therefore, could use the same mindset to develop an internationalization strategy, build their business functions' tasks, and perfect their positioning strategy (see the figure of the BMS-theory in Appendix B). Uganda's SMEs can adopt a tailored approach to international business and tread a path that would anchor them onto the global platform. Operating at the global platform would lead to expanding their trading opportunities, networks, market niches, global resources, and evolving perceptual mindsets (Magnani & Zucchella, 2019).

## **Transition**

Majority of SMEs from Sub-Saharan economies are enduringly and conspicuously absent from the global trade platform of MVAs. In this study, exploration included the possibility of empowering Uganda SMEs that deal in MVA merchandise to sustainably participate in global trade by developing their business functions capabilities, as Atac (2005) had implied. I established the applicability of the BMS theoretical lens to building adequate business functions' capabilities, operation strategy, and consequential profitable and sustainable participation of SMEs in global markets. The study targeted managers of SMEs responsible for making critical decisions on resources allocation, building requisite business function's capabilities, and nurturing a sustainable competitive advantage of their enterprises.

Understanding how SME managers succeed in building requisite capabilities, requires a detailed study of their lived experiences at their jobs through a qualitative case study approach. This approach revealed their routines, contexts, and motivation of making decisions they make under various circumstances. Successful and widespread internationalization of SMEs in Uganda can create a critical mass of businesses operating at different nodes along the value chains and tapping into global trade opportunities, and this can lead to massive absorption of the unemployed population. Achieving a significant mass employment brings several benefits like economic and financial participation for all and a higher purchasing power parity; ultimately laying a firm foundation for the improvement of the population's standard of living (Htoo, 2020).

In Section 2, therefore, I developed and presented a rigorous research methodology; demonstrated how I gathered, analyzed, and documented the findings about SME managers' appreciation of business functions' capabilities development for internationalization. Also included were presentation of the findings, their analyses, and recommendations in section three.

## Section 2: The Project

In Section 2 of this study, I provided information about the data collection and organization techniques. Section 2 includes the purpose statement, the role of the researcher, information about the participants, and a detailed explanation of the research methods and design. Other sections include population and sampling, data saturation, issues of validity and reliability. Section 2 end with a transition and summary.

### **Purpose Statement**

The purpose of this qualitative multi-case study is to explore the strategies that leaders of SSA manufacturing SMEs use for global expansion. I targeted and interviewed five MVA SME managers from the regional industrial hub of Uganda who successfully implemented strategies for building optimal business functions and capabilities for global transactions.

### **Role of the Researcher**

The researcher was the critical instrument for data collection; this enabled a successful acquisition of thick and rich data about the internationalization phenomenon investigated (Henderson, 2018). Using the interview tool (see Appendix A), I conducted semistructured interviews with five participants. I selected participants who met the inclusion criteria set for the study; Mace and Pearl (2021) used an eligibility criteria to select their study participants.

### **Personal Lens**

Because I had a significant acquaintance with Atac's (2005) BMS theory, it could be a potent source of biasness during data collection, interview processes, and

interpretation of responses; Kross and Giust (2019) argued that researchers need not be complacent of their roles and position, bias, and the theoretical assumptions that underly the phenomena of study. A bias-free research process is critical for the generalizability of findings, construct validity of the conceptual model, reliability, dependability, and credibility of the study (Fusch et al., 2018). To mitigate personal lenses and biasness, I developed a comprehensive interview tool guide based on prior knowledge of the BMS theory (see Appendix B). The tool tickled the respondents' perception and appreciation of internationalization mainstreaming into their business models for business growth and expansion, as suggested by Guerin (2021).

To further eliminate personal bias, I engaged triangulation (methodological and data), reflexive journaling, self-reflection, and prolonged engagement with interview participants to probe their experience. Hong and Cross-Francis (2020) and Kross and Giust (2019) argued researchers to adapt strategies that can help them minimize biasness; they emphasized reflective-journaling, reflection on the outcome of the study, and the process itself. To achieve data saturation, I focused on conceptual depth, interpretation of various opinions of participants, and the aptness of sampled cases; Hennink et al. (2019) and Saunders et al. (2018) emphasized the role of achieving data redundancy as a flagship for qualitative research validity. The conceptual depth contributed to the quality of the data and subsequent analyses, as an approach to attain rigor (conformability, credibility, transferability, and dependability) and trustworthiness of the study; Aguinis and Solarino (2019a) and DeJonckheere and Vaughn (2019a) asserted that qualitative

research rigor is premised on the quality of data, their depth, richness, diversity, and complexity.

## **Participants**

### **Eligibility Criteria**

To be included in the study, the participants had to be managers of SMEs in Uganda who are responsible for planning and determining resource allocation to build the capabilities of their enterprises. The participants had built significant business functions' tasks for their enterprises and were exporting their MVAs; Michaud-Dumont et al. (2020) advised that choosing participants should be guided by their respective experience with the phenomena under study. The study included the use of purposeful case sampling to select participants. Participants were members of the Uganda Manufacturers' Association (UMA), which registers all companies engaged in MVA. Kegler et al (2019) chose their respondents through the associational membership, while Jin and Hurd (2018) selected their participants from those involved in strategy building and decision making.

In another similar study, Bahl et al. (2021) selected only those managers who had prior experience in crafting organizational strategies; they only considered participants who had operated in foreign and domestic markets. Stoian et al. (2018) also selected 18 managers of SMEs to investigate the type of knowledge that SMEs require for comprehensive internationalization outside exporting.

### **Gaining Access to Participants**

I gained access to participants through the UMA directory; UMA lists all enterprises that operate in Uganda and add value through manufacturing. Thereafter, I

made physical calls and/or sent initial contact email messages or physically approached and requested them for face-to-face interviews. Su et al. (2020) used physical calling of participants when they were investigating how networks and global value chains impacted on SMEs from developing economies.

### **Establishing Working Relationship with Participants**

Establishing working relationships with participants during interviews is an important part of data gathering. DeJonckheere and Vaughn (2019) highlighted that interview sessions are a special relationship where both parties engage, discuss, and critique topical issues. The researcher must build relationship, rapport, and trust with the participants through listening attentively, being authentic and open, and highlight why such a study is being conducted (DeJonckheere & Vaughn, 2019a; Greenhalgh et al., 2019). Sandvik and McCormack (2018) highlighted the importance of engaging holistically with the interviewees through developing a genuine interest in understanding the participant's lifeworld, open communication, and being person-centered.

In addition to keeping focused on the study objectives and de-identifying data, and as Vogler et al. (2018) suggested, I applied soft skills to overcome bias, observe, digest, and respond to visual cues during the interviews. Conducting qualitative interviews without being conscious of bias affects the rigor, transparency, and credibility of qualitative study, and can lead to an impressionistic interpretation of findings (Bergen & Labonté, 2020; Mackieson et al., 2019). To minimize chances of a rigorless and impressionistic study, I practiced reflexivity, explained in detail the purpose of the study to the participants, provided assurances where applicable, and tailor-framed the questions

to the apparent mood of the interview interface as advised by Bergen and Labonté (2020) and Mackieson et al. (2019). I nurtured trust, working relationship, and rapport with the participants; I made initial phone calls to participants to request for their discussion consent, identified and discussed the challenges they faced, showed interest in learning their emotions, experiences, meanings, and relationships. Bahl et al. (2021) accentuated the benefits of nurturing rapport and working relationship to achieving rigor.

### **Aligning Participants with Overarching Research Question**

The study participants were managers of MVA SMEs who are responsible for crafting the operational strategies for their businesses. Managers are responsible for developing business functions' tasks of their enterprises, and these can configure products that can perfectly penetrate international markets. The study included those managers who presided over an internationalized enterprise, assumed to have successful strategies for building its business functions' tasks. Aligning the participants with the research question was upheld by Wang and Holmes (2019); they aligned participants' understanding of narrative reflection on the curriculum of the university understudy for participation. Yeong et al. (2018) used the same approach to avoid tension and ambiguity during their study.

### **Research Method and Design**

In this section, I provided a detailed explanation of my research design and methodology. The explanation of the research design and methodology included information about how I conducted the study, and how data I realized saturation. In the



discussion, I included the process of data analysis and how I addressed the reflexivity, confirmability, and reliability of the study findings.

### **Research Method**

For this study, I selected the qualitative methodology to discover how MVA SME internationalization could occur by developing a business's functional capabilities. The choice of the methodology was consistent with Hamilton and Finley (2020), Álvarez et al. (2019), and Dabić et al. (2020) when they observed that qualitative based methodologies are instrumental in investigating decision-making practices in the management discipline. Zucchella (2021) described how investigating a phenomenon requires a researcher to focus on words rather than quantifications, during data collection and analysis, because words are inherently capable of exposing the substantive meaning.

To discover how an SME can internationalize through its business functions' tasks' development, researchers would best use qualitative inquiry method. With such an inquiry, a researcher can conduct a detailed probe to establish how managers choose and allocate resources between tasks (Niittymies, 2020a); a researcher can engage a naturalistic approach to explicate the complex-dynamic phenomena of internationalization within its natural setting. Studying and interpreting a phenomenon within its natural setting exposes peoples' experience and the treasurable meanings they attach (Bandara et al., 2020).

Determining and developing the functional capabilities of any business largely depend on the enterprise's resource deployment strategy, which is driven by intra-organization stimuli, top management characteristics like information processing

capabilities, and the managerial outlook toward markets access and expansion (De-Cock et al., 2021; Li, 2018). Understanding the managerial competencies require an in-depth, interactive, and humanistic discussions to initialize the emerging data into themes (Crick, 2020). Managerial competencies drive management's intrinsic appreciation of participation in global markets, the rationality between affordable losses and psychological motivation, and the ability to navigate through complex international environments (García et al., 2018).

Qualitative methodology is instrumental in explaining complex phenomena and situations that cannot be explained or predicted using statistical methods (Peterson, 2019). Candela (2019) argued that qualitative methodology can create a learning and living relationship between the researcher and the participants; with no doubt, qualitative methodology enhanced my understanding and interpretation of the concept of internationalization from the business practitioners' viewpoint. The methodology has an in-built mechanism of co-constructing knowledge between the researcher and the participants, as the inquirer's probing can unlock and point to new insights for which the participants may have had no idea (Bansal et al., 2018; Chaudhry, 2018). During the study, I used member checking feedback mechanism because it is capable of authenticating and verifying the data gathered, and it can create therapeutic feelings (Butler et al., 2021; Roberts & Muralidharan, 2020); participants appreciated my recollection, correct recordings, new found rapport, and new knowledge or contextualized insights .

I used Atac's (2005) BMS theory as the theoretical foundation for this study. I found the theory appropriate because the theorist advocated for building business functions for competitiveness and maximizing bargaining power of a firm. Since I was not testing relationships and its applicability, the quantitative methodology and mixed methods were inappropriate. Quantitative and mixed methods test hypotheses and examine causality and relationships between contextual and theoretical variables for factual representation of what managers do (Berryman, 2019; Butler et al., 2021), yet I was concerned with establishing deeper insights of *what*, *why*, and *how* managers developed their businesses' operational capabilities for internationalization.

Qualitative studies are useful when studying a complex phenomenon like what motivates SME managers to craft operations strategies the way they do. Qualitative inquiries provide the inductive interpretation and in-depth understanding of a complex phenomenon (Chaudhry, 2018; Dyar, 2022; Stoian et al., 2018). Contextually, this qualitative inquiry enhanced my comprehensive exploration of the depth and richness of SME managers' experiences in developing their business functions' capabilities, and I was able to establish theoretical intuitions of the flip side of internationalization.

### **Research Design**

This study was based on a multi-case research design. The procedures and study plan enabled and facilitated me to develop a holistic understanding of the internationalization phenomenon; Abutabenjeh and Jaradat (2018) and Álvarez et al. (2019) explicated that if a researcher applied the appropriate research procedures and study plan, they would register a detailed understanding of the phenomena. A case study

design was appropriate for this study because I was able to study how events occurred and how they influenced each other. Using a case study design enables a researcher to flexibly and intensely analyze systems, units, situations, or populations within a specified time or space (Cook & Kamalodeen, 2020).

With a case study inquiry, a researcher is able to understand in details, and interpret situations including their meanings and contexts (Aspers & Corte, 2019). A researcher is able to address the depth (i.e., within case) and the broader (i.e., across multiple cases) characterization of the data collected (Belotto, 2018; Hayashi et al., 2019a). A researcher can ably gather data about contextual details (Dyar, 2022; Guetterman & Fetters, 2018; Lawani, 2020; Wynn & Williams, 2020) thus, it was an appropriate design for this study in which I focused on how managers of Ugandan MVA SMEs developed their business functions' tasks for global expansion.

A qualitative case study must be guided by the principle of depth, contextuality, and breadth that are instrumental in understanding a phenomenon in its real-life context (Davidson et al., 2019; Druckman & Allen, 2021; Prashantham et al., 2020; Ranta et al., 2018; R. P. Smith, 2018). I first established individual case experiences and then compared the various cases for analytical generalization. I used analytical generalization to map the similarities and differences in the various organizations' approaches to internationalization.

To establish SME managers' hands-on experience in developing business functions' tasks using a multiple-case approach, is consistent with Ayden et al. (2020)'s approach, as they used multiple-case study to establish how Turkish SMEs

internationalized. By using a multiple case study design, I conducted individual and cross-case analyses; this resulted into an in-depth study of a complex SME internationalization phenomenon that was based on building business functions' tasks and contextualized the phenomena into SSA business environment. Jafari-Sadeghi et al. (2020) highlighted the role of cross-case and individual participants' analyses to contextualizing the phenomena.

To study managerial behavior in allocating resources, a multi-case study design is instrumental (Ojala et al., 2019); cases can offer detailed information about the business environment and contexts like the SME Internationalization. To conduct case studies successfully, researchers must be exposed to naturally occurring sources of information like places, peoples' physical, sociological, and ideological interactions (Aspers & Corte, 2019; Ebneyamini & Moghadam, 2018).

Whereas phenomenological designs give a voice to target study units to describe their experiences of a phenomena, a researcher is not expected to explain or interpret but to make assertions validly supported by respondents' revealed intuitions (Cuthbertson et al., 2020; Ndandula, 2020). Limiting this study to description of what SME managers experienced during internationalization was outside the scope this study, as it targeted to interpret why and how SME managers built their business functions' tasks for global expansion. Interpreting the managers' decisional and resource allocative behaviors represented their subjective outcomes of their beliefs and perception, which metamorphosed into strategies (Ndandula, 2020). Thus, the study targeted managers'

experiences, motives, what they do, and why they do what they do; a case study approach best revealed interpretation and articulation of such behaviors.

Grounded theory involve generation of a suitable or substantive theoretical explanation of a phenomena through a systematic collection and inductive analysis of data (Charmaz & Thornberg, 2020; Conlon et al., 2020; Maupa & Abidin, 2020). A researcher would then assess similarities and differences from the responses, leading to an inductively phenomenal-tailored theory that is grounded in the data (Aspers & Corte, 2019; Dos-Santos, 2018; Neghabi & Anoosheh, 2021). On the contrary, examining SME internationalization contextual issues and complexities would not be fully explored by theoretical grounding, as the researcher was not seeking to build an internationalization lens but validating the efficacy of strategy crafting based on the BMS theory.

### **Rigor**

Rigor, in a qualitative study, refers to the trustworthiness of the research findings (Aguilar-Solano, 2020; Aspers & Corte, 2019; Hoorani et al., 2019; Maher et al., 2018). A qualitative research can be categorized as trustworthy if its findings are credible, transferable, confirmable, and dependable (Hoorani et al., 2019; Johnson et al., 2020b). Researchers in a qualitative studies, can realize rigor through a systematic study outfit that focuses on methodological, methodical, contextual, and the researcher's reflexivity assessment and minimization issues (Chun-Tie et al., 2019; Coy, 2019; Johnson et al., 2020a; K. Roberts et al., 2019). I, therefore, ensured a rigorous study of business functions' capabilities and internationalization by choosing the appropriate methodology and methods, and properly bounding the sample cases while minimizing reflexivity.

The methodological requirement of rigor in a qualitative inquiry involve following a systematic and transparent approach, for which the researcher must align the research question with an appropriate system of inquiry, paradigm, philosophical world view, and the purpose of the study (Aguilar-Solano, 2020; Al-Ababneh, 2020; Berryman, 2019; Davies & Fisher, 2018; Ng et al., 2018). To achieve a perfect alignment, a researcher must adapt a step-by-step approach that include problem identification and articulation, designing, conducting, and reporting (Abutabenjeh & Jaradat, 2018; Johnson et al., 2020b; Sileyew, 2019). With the paradigmatic framework for rigor, the research question must be consistent with the ontological, epistemological, and axiological stances (Alpi & Evans, 2019; Davies & Fisher, 2018). To elicit the answers to this study's research question, I adapted a qualitative research inquiry, a relativist ontological stance, a detailed interpretative epistemological stance, and a naturalistic or constructivist paradigm.

Johnson et al. (2020b) and Ng et al. (2018) emphasized the role of appropriate research processes and steps to achieve the methodical requirement of rigor for a multi-case inquiry; I keenly observed steps like sampling and recruiting participants, obtaining consent, ensuring confidentiality, data recording and transcription, and emotional-suitability timing of participants. I, also, encouraged participants to adequately explain their positions during data collection, even if it necessitated highlighting their concerns (Zahle, 2019). Whenever required, I adjusted the processes as the study progressed to ensure a trustworthy study result; Aspers and Corte (2019) encouraged researchers to adjust processes to suit unfolding critical research requirements as the study progressed.

Data analysis for qualitative case studies, as one of the methodical tools, is prone to subjective assessment of researchers (Aspers & Corte, 2019; Johnson et al., 2020a); to minimize subjectivity, I adapted specific standards like audit trail and triangulation of the written text, filed data, observed data, and interview transcripts. Adaptations included the iterative framework to data analysis because of allowing continuous reading, internalizing, reflection, and interpreting the meaning represented by the data, as highlighted by Abutabenjeh and Jaradat (2018), Phillippi and Lauderdale (2018), and Ng et al. (2018). At the stage of drawing conclusions, I interpreted the results in detail; looking beyond a mere description of themes, behaviors, and patterns. At the stage of reporting findings, I focused on achieving trustworthiness through transparency, identifying and addressing personal bias, including other potential confounders, as proposed by Johnson et al. (2020b).

When conducting a qualitative inquiry, the researcher becomes the primary research tool, so this situation requires a researcher to be sensitive of personal biases, misconceptions, and any other ethical issues (Clark & Vealé, 2018; Johnson et al., 2020b). Personal biases affect the rigor of the study (Dodgson, 2019; Dyar, 2022; Johnson et al., 2020b); to minimize biases, therefore, I practiced reflexivity throughout the study process.

Reflexivity relates to the nature of influence a researcher imposes along the research processes; the influence may be consciously and intentionally exerted or unintentional (Bansal et al., 2018; Clark & Vealé, 2018). A qualitative researcher need to be aware of their paradigmatic positions and confront them at each stage in the research process and minimize their apparent influence (Cain et al., 2019). Paradigmatic



influences may include epistemological and ontological stances, the biases, the previous experiences, the prior knowledge, plus the feelings and assumptions (Dodgson, 2019; FitzPatrick, 2019). To achieve rigor, therefore, I accounted for assumptions about the phenomena, personal experience, and clear descriptions of contextual relationships.

In a multi-case study inquiry, the researcher must contextualize the cases selected; contextualization of a case is to define its boundary paying attention to the phenomena, the participants, and their lived experiences (Phillippi & Lauderdale, 2018). To bound a case, a researcher can use the CAGE framework (see page 33) to frame it based on time and space, for this enhances the generalizability of findings (Phillippi & Lauderdale, 2018; Teagarden et al., 2018).

To achieve rigor for this multi-case study, I selected the cases following a well-articulated criteria that specified the focal specifics of uniqueness, diversity, and contexts; this offered agreeable reasons for selecting particular data sets, and carrying out triangulation (Dang Nguyen et al., 2019; Hoorani et al., 2019). I applied purposeful sampling, selecting only internationally transacting MVA SMEs; purposefully selected cases provide a deep and rich data about the phenomena, and enhances cross-case comparisons for replication (Tuominen & Martinsuo, 2019). For a credible, deep, quality, appropriate, and cohesive study (FitzPatrick, 2019; Johnson et al., 2020; Raskind et al., 2019; Smith & McGannon, 2018; Sovacool et al., 2018), I applied iterative data analysis framework and data source triangulation to enhance transparency and replication of findings.

## **Data Saturation**

Reaching the saturation milestone in the study is critical for validity, quality, rigor, and trustworthiness (Forero et al., 2018; Hayashi et al., 2019a; Korstjens & Moser, 2018; Lowe et al., 2018a; Saunders et al., 2018). Data saturation precipitates sample size adequacy, and is a pre-condition to generalizability and theory formulation or extension in case study research (Carminati, 2018). There are two levels of saturation, namely, data saturation and thematic saturation (Moser & Korstjens, 2018a; Saunders et al., 2018).

Data saturation is achieved when a researcher gets to a level of data redundancy; a level where no new information is coming out of the study (Braun et al., 2019; Moser & Korstjens, 2018a; Saunders et al., 2018; Vasileiou et al., 2018). Thematic saturation is achieved when there are no new codes or themes coming out of the new data being collected, and this type of saturation is realized at the data analysis stage (Braun et al., 2019; Lowe et al., 2018b; Saunders et al., 2018). To achieve data and thematic saturation in this study, I conducted a two layered sampling design, a purposive selection of cases, and a criterion-based selection of participants.

## **Population and Sampling**

### **Defining the Population**

Understanding the internationalization phenomena from the perspective of business functions' capability development required a detailed study with the managers who plan, acquire, allocate SME resources as per their priorities, and participate in internationalization (Atac, 2005; Lyver & Lu, 2018; Michaud-Dumont et al., 2020). Thus,

the participants of this study were involved in building business functions' tasks for their enterprises, while such enterprises were exporting their MVAs.

### **Sampling**

Similar studies focusing on to different contextual internationalization variables, used multiple case samples ranging from two to over 10 (Di-Mauro et al., 2018; Jafari-Sadeghi et al., 2020; Neubert, 2018; Ooi & Richardson, 2019). Contextual factors, such as the scope of the research question, the quality of the data collected in the initial stages, the analysis strategy, and the theoretical framework do influence the variation in the number of cases (DeJonckheere & Vaughn, 2019a; Sim et al., 2018). Because there are few MVA SMEs in Uganda that have internationalized, I targeted five cases; according to Dang Nguyen et al. (2019), a multi-case study must target a minimum of four cases for optimal full design benefits.

Five cases is a sufficient number to gather and analyze the data that is necessary to answer the research question (Lwakatare et al., 2019; Vasileiou et al., 2018). For this business functions' tasks contextual internationalization study, I purposefully selected five cases whose operational information demonstrated a practical experience of the internationalization phenomena, and were participating in international transactions. With the sampled five cases, I achieved both the data depth, data breadth, and data saturation (DeJonckheere & Vaughn, 2019a; Lindgreen et al., 2021; Moser & Korstjens, 2018a). I realized data saturation after creating 227 codes, which after thorough analysis, they collapsed to 188 codes; I reached information redundancy and thematic saturation.

Within the five targeted cases, I interviewed participants who could provide deep, rich, and usable information about the conceptual framework and the research question of my study, hence, criteria sampling (Moser & Korstjens, 2018a; Vasileiou et al., 2018). To identify the participants, I conducted criterion sampling, for which, all participants were responsible for resource allocation in their respective enterprises. The potential target participants were SME managers because according to the Atac's (2005) BMS theory, managers are responsible for developing the operational strategy with which the business functions' tasks are developed. Such managers could provide an in-depth information concerning the various contextual components of the internationalization phenomena.

### **Ethical Research**

Getting ethical approval from Institutional Review Board (IRB) is critical and important for purposes of protocol and procedures, protection in case of potential legal issues, ensuring trust, commitment, and ethicality in research (Wu et al., 2019). In most cases, researchers perceive ethical approval prior to undertaking research as another bureaucratic practice and a method of gatekeeping in academics. In practice, there are cases of subtle infringement on respect, justice, and beneficence or psych harming of participants, as researchers subtly assume a seamless divide between their public and private spaces during communication and interactions (Kostovicova & Knott, 2020; Ngozwana, 2018).

It should be noted that there are always procedural, practice, and oriented risks, for which earlier identification and anticipations would prompt the researcher to prepare mitigation strategies (Reid et al., 2018). Procedural practices include respect, justice, and

beneficence; while other practices look at day-to-day ethical issues that arise while conducting research. Other ethical principles that researchers need to be wary of include: to listen, to respect participants' narratives, anonymize participants and locations; informing participants about voluntarily participation, right to consent, and their confidentiality.

A researcher should focus on access to participants through convenient communication channels, privacy of interview sessions, and anonymizing participants during dissemination of results and data analysis (Munhall, 2018). If a researcher keenly observes the above mentioned ethical principles, and formally invite participants, they will choose to either answer, abandon, or elaborate details (Belotto, 2018; Bengtsson & Fynbo, 2018). To forestall the potential impasse and risks that may arise out of ethical negligence in qualitative surveys, a researcher must seek informed consents from the targeted participants (Kostovicova & Knott, 2020; Ngozwana, 2018; Reid et al., 2018).

While conducting the study, I secured informed consents from participants to voluntarily be part of the study, provide information, and prioritize their needs. I achieved their consent by explaining the essence of the study, the proposed risks and benefits, privacy and anonymity, and the use and disposal of their information. Explaining the essence of the study was a critical requirement to gain participants' trust, confidence, member-checks for information accuracy, and not infringing onto their right to withdraw from the study before giving reasons (Bengtsson & Fynbo, 2018; Ngozwana, 2018; Twis et al., 2020). Based on Munhall (2018) advice, I informed all participants of the possibility of sharing findings with them, especially if they had been vaguely perceiving

the internationalization phenomenon, and were still enthusiastic of the empirical knowledge.

As per Yin (2014) and Phillippi and Lauderdale (2018), I protected participants' rights before, during, and after data gathering and analysis in conformity to confidentiality. In addition, I kept their data usage within the scope of this research. During data analysis, as per Ngozwana (2018), I anonymized and preserved all potentially traceable data to prevent potential readers from identifying the source. Anonymization, in this context, means that individual participants and organizations cannot be traced even when additional information about them is considered; data collected from them is irreversibly processed to such a form that it is extremely difficult to link it to a particular individual or organization (Abbott et al., 2019; Hasanzadeh et al., 2020).

The study included protection of participants against being singled-out, linked-to, and inferred-to (Hasanzadeh et al., 2020); this required securing a consent agreement that stipulated their participation, extent of anonymity, and use of their data contributions (Abbott et al., 2019; Gerrard, 2021). I anonymized my participants by identifying and altering sections of their data contributions that required privacy; created and characterized new personas that offered a composite of participants yet not linked to any real individual, and discussed with them, how they would want to be represented, that is, them choosing own pseudonyms and aliases.

To ensure further confidentiality of my participants and their data against re-identification, I intend to securely keep the data for at least 5 years; Gerrard (2021), Lv

and Qiao (2020), and Mohammed & Ibrahim (2019) advocated for secure data preservation and sharing formats that strongly anonymizes research data if it is to be kept for long and shared. Conforming to all ethical research procedures, as discussed here above, was approved by Walden University's IRB, upon which they issued a serial number.

### **Data Collection Instruments**

In this section, I presented a brief explanation of the data collection tools, and how they enhanced the reliability and validity of the study. Given the sensitivity and confidentiality of business strategy related information, participants in the study prefer data collection approaches that would ensure their data safety, and, therefore, they would want to assess the trustworthiness of the researcher; this calls for nurturing a trusted researcher-participant relationship (Johnson et al., 2020b; Rashid., et al., 2019) . To provide for triangulation of data in a qualitative multi-case inquiry, I used three data collection protocols, that is, the interviews, the documentation, and the observation protocols. In the proceeding subsections, I presented a brief explanation of each of the protocols mentioned above, and applications, including a demonstration of the centrality and criticality of the researcher in the study.

#### **The Instruments and Techniques**

In this subsection, I explained each of the protocols for data collection. The protocols inherently carry vignettes which minimize biasness, interpersonal incomparability, and effects of differential item functionality for accurate interpretation and responses (Silva et al., 2019). I used captions of vignettes to present hypothetical

situations, for which respondents could easily relate with their experiences and provide more accurate answers.

### ***Interview Protocols***

While conducting the study, I used interview protocols with semistructured questions to elicit responses from participants about their experience in building business functions and capabilities. An interview protocol is a list of well framed questions a researcher uses to collect qualitative data (Braaten et al., 2020; Deterding & Waters, 2021). A well-developed interview protocol assists the researcher to have total control over the direction of the study; while participants can discuss their experiences about the phenomena and constructs with purpose and objectivity (Braaten et al., 2020; DeJonckheere & Vaughn, 2019a; Gani et al., 2020; Kramer et al., 2020). Using an interview protocol helped me to keep the study focused onto the key objectives, and to elicit appropriate answers to the research questions.

Felzensztein et al. (2020) used semistructured interview protocols to establish how management teams of SMEs in the southern hemisphere developed various capabilities that were relevant to their internationalization agenda. Franco et al. (2018) developed and used interview protocols to identify factors that propelled creative incubators' success in cultural entrepreneurship, and they used their protocols to collect data on the character, the activities, and the factors that led to success of incubators. In this study, I used interview protocols with the SME managers, to establish how they build their business functions and capabilities.



I piloted the interview questions on two sample cases; this was in line with what Malmqvist et al. (2019) did when they were examining the relationship between social support and suicide tendencies. Through pre-testing the protocol, I was able to detect: if the tool was valid and clear, the validity of research process, participants' confidence with the questions, potential adjustments, if it addressed the constructs of the BMS theory, if it was time efficient, and its methodological efficacy (Braaten et al., 2020; DeJonckheere & Vaughn, 2019b; Gani et al., 2020; Saddour, 2020). The purpose of piloting my interview protocol was to establish the usefulness, credibility, and willingness of my target participants to provide answers as in Gani et al. (2020).

During the piloting stage of the interview tool, I tested for comfortability of interview settings and conduciveness to participants, the flexibility of the instrument, the coverage of constructs, and its ability to solicit more detailed explanations and information from participants. I also focused the efficacy and quality of the interview process; in which I determined the structure of the interview sessions during the interview phase, that is, the brief introductions and explanations, the sitting arrangement, data recording, and rapport building. Interview process efficacy and quality testing focused on the pre-interview stage (Braaten et al., 2020; DeJonckheere & Vaughn, 2019b; Deterding & Waters, 2021; Gani et al., 2020). Therefore, piloting the protocol helped me to fine-tune the questions, validate the interview process, and to adapt appropriate procedures, instrument, and managerial approaches for a smooth remainder of the study.

### ***Focused Observation***

I collected some data through a planned and focused observation, for which I was guided by an observation guide (see Appendix D). Through the observation method, I gained important insight by looking at, listening, and systematically interpreting various cues (Busetto et al., 2020). I observed the production lay-out and material handling sections of the sampled SMEs because they are one of the critical business functions tasks that enhance timely deliveries to target markets. Through observation, I assessed the enterprises' manufacturing plant layouts, as it is a critical functional task to building a competitive advantage of an enterprise. It should be noted that plant layout determines the efficiency of the transformational processes of an enterprise, and transformational time optimality enables the manager to serve markets in time (Atac, 2005; Kamble & Patil, 2019; Radhwan et al., 2019; Zhang et al., 2019).

Nafik et al. (2019) used observation and documentation to study how Islamic women entrepreneurs run their businesses in the wake of strict Islamic culture for married women in Ikatán; while Barwinski et al. (2020) used observation to study how new ventures could optimize their potential innovation capabilities through engaging collaborative work spaces (Barwinski et al., 2020; Nafik et al., 2019). Neubert et al. (2019) used observation method to study 45 software firms in Paraguayan to establish the impact and logic behind (non-) rational decisions made by the drivers of internationalization. It should be noted that during the face-to-face interview sessions, observation complements data authentication as a researcher can observe non-verbal communication cues and also seek clarity on emerging ambiguities (Ali, 2018;

Ardiansyah et al., 2018; Busetto et al., 2020; Kuyken et al., 2018; Smit & Onwuegbuzie, 2018).

### ***Documentation Protocols***

During the study, for some enterprise that allowed me to access their documents, I used documentation protocols to study their operational strategy plans that guided their business functions' development. Document analysis provided background information and assisted to corroborate interview and observational data. Document analysis is an iterative process of reviewing and interpreting existing company written documents like strategic plans, annual reports, policies, guidelines, and feasibility studies (Busetto et al., 2020; Mackieson et al., 2019). The intention of analyzing documents is to appraise, synthesize, and make meaning from the company documents to reinforce, corroborate, and triangulate data collected through other protocols (Mackieson et al., 2019).

Urzelaia and Puig (2019) used document analysis to establish the influence of international social capital and choice of markets to penetrate, and they argued that document analysis was instrumental in providing background information and can corroborate interview and observational data (Urzelai & Puig, 2019). Ardiansyah et al. (2018) used document analysis and archival retrieval to establish SMEs internationalization characteristics and their internationalization speed. Analyzing company documents like strategic, production, and financing plans articulates management's attitude, projections, and intent behaviors towards internationalization capability development.

## **Researcher's Role**

In a qualitative study, a researcher is the primary research tool responsible for collecting, analyzing data, and shaping results (Malmqvist et al., 2019). Because researchers spend considerable efforts and time to develop the data collection tools and interview protocols, they effectively become the first data collection instruments (Dodgson, 2019; Haven & Van Grootel, 2019). It is the researcher's duty to develop protocols associated with the study, such as the interview questions, interview processes, designing the structure of the interviews, and nurture a rapport. Researchers achieve all the above through participation and involvement as they get access, have a feel of, and observe the natural environment of the participants (Clark & Vealé, 2018; Dodgson, 2019; Phillippi & Lauderdale, 2018). Researchers must be conscious and aware of personal biases while conducting qualitative studies (Alpi & Evans, 2019; Moser & Korstjens, 2018b).

As a researcher, in this study, I was ethically sensitive by observing several principles mentioned in the Belmont Report that provided an analytical framework for resolving ethical issues associated with human involvement in research inquiries (Anabo et al., 2019; Millum, 2020; Stewart, 2021; Tsosie et al., 2021). I sought the informed consent of target participants in a move to respect and protect them. Achieving respondents' consent involved divulging to them all relevant information about the inquiry including the objectives, the methods, and the apparent benefits and risks. Observations included beneficence, which involve optimizing personal and wider social

benefits while minimizing potential afflictions for both the respondents and their enterprises (Anabo et al., 2019; Stewart, 2021).

During and after the inquiry, I observed confidentiality and privacy of both the participants and their respective enterprises. I achieved this through conducting a deception free inquiry, anonymize respondents through pseudonyms, and protecting and preserving their data as proposed by Anabo et al. (2019) and Stewart (2021). Besides the ethical considerations, I assumed full responsibility of the data analysis process by preparing, exploring, specifying, and integrating (PESI) empirical material for deeper interpretation as per Rashid et al. (2019). Approaching material interpretation using the PESI concept is critical for a systematic and organized presentation of the final phases of a qualitative inquiry.

### **Enhancing the Reliability and Validity of the Instrument**

To ensure a trustworthy and credible qualitative study, I used valid and reliable data collection instruments. A study is considered trustworthy and credible if a researcher is rated credible, findings are believable, research design and processes demonstrate rigor, the methods are appropriate and applicable, and the study is relevant (Daniel, 2019b; Rose & Johnson, 2020a). In the following paragraphs, I explained the various ways validity and reliability of the research instruments were addressed for valid and reliable data.

Validity refer to conclusions, uses, inferences, and implications that can be made from the results of a qualitative study (Fitzpatrick, 2019; Rose & Johnson, 2020a). This imply that validity tests the authenticity of the research process including the design, data

collection, analysis, and the appropriateness of paradigmatic mind frame that a researcher applies to the study (Candela, 2019; Fitzpatrick, 2019). In this study, I framed and imputed validity from the interpretative position, to infer conclusions from the participants' articulation of the internationalization phenomena and their readiness to compete and expand into international markets. I also framed validity from the descriptive stand point, which makes inferences from thoroughly reporting the behavior and physical events a researcher has observed.

To enhance validity, I used several approaches including: purposeful and theoretical sampling to target managers with sufficient firm internationalization knowledge; collect rich data of what people say, plan, do, and produce to have a complete, varied, and detailed understanding of the phenomena; and provide thick description, which describes the study setting, participants, constructs, and events to paint chronology of the study to the reader (Angela Caretta et al., 2019; Brear, 2019; Fitzpatrick, 2019). Other validity enhancement strategies included triangulation by establishing results convergency through collecting data from multiple sources, participants validation through member checking, and embrace analytical rigor through continuous and iterative analyses and review of the protocols, verbatim recording and transcription of responses, and self-reflection (Fitzpatrick, 2019; Lemon & Hayes, 2020; Rose & Johnson, 2020a).

Reliability, by contrast, is a concept used to measure the level of consistence of given research processes to obtain similar results if the study were to be repeated (Hayashi et al., 2019b; Rose & Johnson, 2020b). It addresses the soundness of research with respect to the methods, methodological processes, the consistence, the clarity, and

thoroughness in the research process itself (Daniel, 2019b; Hayashi et al., 2019b). To enhance the reliability of these instruments, I applied triangulation and achieved dense description, data saturation, rich-clear-detailed description, and pilot tested the data collection protocols; these methodical procedures were highlighted by Daniel (2019b), Hayashi et al. (2019b), and Rose and Johnson (2020a).

### **Instrument Appendage**

I have appended all the data collection protocols to this document (see Appendix A and D). Also included is a heading in the table of contents to identify and recognize their existence.

### **Data Collection Technique**

In this qualitative inquiry, the intention was to establish the effective strategies that MVA SME managers use for global expansion, using three methods of data collection. The first source of data was the interviews with the MVA SME managers; the second source was from observation of the plant layout, and the third was the analyses of operations and strategic plans of the enterprises. The interview included semistructured questions for optimal flexibility (Twis et al., 2020). Semistructured interviews enable the collection of rich and thick data that could be used to answer the research question; Ahlin (2019), Alam (2021a), Mahat-Shamir et al. (2021a, 2021b), and Striepe (2021) emphasized the aptness of a semistructured interview protocol to solicit detailed qualitative data.

Interviews included five managers of MVA SMEs because such personnel are responsible for crafting and allocating resources for their enterprises' operational

strategies (Niittymies, 2020b). There were 61 semistructured interview questions on the protocol list (see Appendix A). I conducted interviews in private rooms at the respective company premises, and interview sessions were audio-recorded so that the data could be transcribed later. Another source of data was observation, in which I observed the plant lay-out, guided by the observation protocols as Busetto et al. (2020) guided in their paper.

With document analysis, I requested management to allow access to their operational and strategic plans related documents, to synthesize their respective global market penetration plans, projections, and their efforts to strengthen their business functions' tasks for building a competitive advantage. I engaged background checks to establish the original purposes of these documents, their criticality, and contextuality to the phenomenon. Background checking of documents enables data triangulation and presentation (Alsharari & Al-Shboul, 2019; Natow, 2020b).

### **Advantages of Data Collection Techniques**

Using semistructured interviews I elicited wide-scoped responses from participants, which evolved into lines of conversations than could otherwise be anticipated; interviewer's iterative interactions and rapport building with the participants can unfold to reinforce deep and broader data elicitations about the phenomena (Brown & Danaher, 2019; DeJonckheere & Vaughn, 2019b). DeJonckheere and Vaughn (2019b) argued that using semistructured interview in an inquiry helps a researcher to collect adequate information about participants' experiences, opinions, perceptions, beliefs, personal and sensitive issues, thoughts, and exploratory ideas related to the phenomena. Semistructured interviews are inherently flexible in application; they can be administered



through technological-based gadgets like telephones, internet based channels like e-mails, and can be administered as e-interviewing through computer assisted programs of zoom, skype, imo, and telegram (Brown & Danaher, 2019).

Collecting data through observation method helps the researcher in many ways; they can get into contact and gain insights about the phenomena or behavior instead of depending on reported behavior (Busetto et al., 2020). Ultimately, the researcher reduces the psychological distance between them; this offers a platform onto which the researcher can discover potential information about the phenomena, and gain detailed insights surrounding the survey question (Busetto et al., 2020; Schmiedel et al., 2019).

Observation methods allows a researcher to conduct informal, spontaneous factual checks, and conversation with respondents; this can lead to variable information, insights, and conclusions that is variously different from what would come out of formal interviews (Busetto et al., 2020; Katz-Buonincontro & Anderson, 2020; Natow, 2020b). During this study, I observed the plant layout component of the participating SMEs' manufacturing sections, I assumed the role of a complete-observer, as this approach would ensure validation, authentication, and verification of interview data.

Wasserfallen et al. (2019) argued that document analyses provide a solid understanding of documented production policies, plans, and strategic market operational issues; this enables interview data validation and completeness of data collection.

Mackieson et al. (2019) identified the role of document analyses as a way of corroborating, supplementing, and evaluating historical data, understanding past influences, and assessing current plans or policies. Effective document analyses help the

researcher to achieve rigor, minimize potential biases, and increase transparency in a qualitative inquiry.

### **Disadvantages of Data Collection Techniques**

Focusing on eliciting deep-seated opinions, perceptions, and abstract behaviors, semistructured interviews put participants into a puzzling moment, for they end up revealing personal, sensitive and strategic information to the researcher (DeJonckheere & Vaughn, 2019b). Brown and Danaher (2019) argued that semistructured interviews portray a contradictory stance, for which a researcher is considered a research tool, yet they are expected to play the role of human encounter as they build rapport with participants.

Ross and Zaidi (2019) observed that, with observational methods of data collection during a qualitative inquiry, participants can influence data collected especially when they change their behavior and attitudes after knowing that they are being observed. Katz-Buonincontro and Anderson (2020) identified the observation method suitability choice challenge the researcher must engage; they argued that a researcher must make an appropriate choice of which of the four types of the observation methods is better suited for a given inquiry, and a given choice may fail to optimize the benefits of observation method.

Mackieson et al. (2019) observed that using document analysis method of data collection during a qualitative inquiry poses several challenges including the unstructured data in organizations. Such type of data may not be relevant to answer the research questions being studied, and it may not address the richness, reliability, validity, and

quality aspects of data (Mackieson et al., 2019; Natow, 2020b; Wasserfallen et al., 2019). Therefore, using observation as a data collection method, the researcher must be sensitive to perfectly align the research objectives, the data available and its accessibility, the specific research question, and potential data analysis methods (Mackieson et al., 2019).

### **Data Organization Technique**

As per the research design, data was collected from interviews, observation, and SMEs' documents review to inform the extension of internationalization phenomenon to SMEs. I archived the data electronically for convenient retrieval (Chang et al., 2018; Deterding & Waters, 2021), and dispose of it after 5 years because data becomes obsolete after that period in the business environment.

### **Data Analysis**

Having chosen the case study design to study the internationalization phenomenon for SMEs, I applied triangulation to establish the realistic explanation of SME internationalization. Triangulation, in this context, corroborate row data, confirmed the findings,g and enhanced the completeness of the data collected from the multiple cases (Abdallae et al., 2018; Barwinski et al., 2020; Dzwigol, 2020; Dźwigoł, 2019; Fusch et al., 2018; Heesen et al., 2019; Maiti & Choi, 2021; Natow, 2020a; Rooshenas et al., 2019). Therefore, I used methodological triangulation to corroborate row data using the three proposed data collection methods above; I, then, conducted data triangulation to correlate various managerial perspectives towards business functions' capability building from the five cases.

Successful triangulation ensured data saturation and increased internal validity to justify causal relationships, which is a key component in this explanatory case study (Atac, 2005; Fusch et al., 2018; Moon, 2019; Noble & Heale, 2019). I triangulated the data collected through interviews of SME managers with evidence I extracted from key planning documents of the enterprises. Documentary evidence provided a blueprint of capabilities' development process guidelines, which management was supposed to follow, allocate resources, and align activities leading to their development. Observational data, on the other hand, provided insights into building the quantity and quality capabilities of the plants, and was used to correlate or triangulate what managers gave during their interview.

Using an inductive analysis process (data reduction, display, conclusion drawing and verification), I transcribed and textualized the raw data to their presence (textualized face-to-face data), and achieved a moderate topical visibility and articulation as by Alves et al. (2018) advice of data transcription. I coded and categorized the textualized data together with additional filed notes taken during interviews and observation; bearing in mind that such data must maintain their brute-status (interpretable and codable with minimal researcher bias) (Williams & Moser, 2019). With optimal reflexivity, follow up included a comprehensive thematic analysis; an accurate theming exercise which drew together codes that appear to describe a common context from various participant responses (Buetow, 2019; Castleberry & Nolen, 2018; Dodgson, 2019; Roberts et al., 2019).

For accurate and reflexivity scoped coding, I used a qualitative data analysis software, NVivo because its famous for robustness in handling voluminous textual data, compatibility to case study design, enhancing efficient, accuracy, exhaustiveness, and extensive coding mechanism (Bonello & Meehan, 2019; Dalkin et al., 2020; Elliott-Mainwaring, 2021). Using a line-by-line coding approach, I identified 227 codes, which reduced to 188 codes after a thorough, iterative, and continuous data analysis process. NVivo allows the researcher to be in total control of the process (Woods et al., 2016; Zhao et al., 2016). NVivo has the capability of enhancing coding as it offers a platform at which codes are recorded and analyzed on request, and this is boosted by its ability to present analyses in highly visualizable formats like tree maps, charts, models, and relationship diagrams (Alam, 2021; Houghton et al., 2017b; Trigueros-Cervantes et al., 2018).

These visualization tools together with other platforms like logfiles, are capable of saving and exporting coded extracts into the system; they can also multi-task and handle many items at ago, hence offering a transparency mechanism that can ascribe to trustworthy of research (Pratt et al., 2020). With a trustworthy study, voices of discontent about trustworthiness, reliability, confirmability, and transferability often raised about qualitative inquiries are effectively silenced. Typical of data gathering in case studies, I simultaneously synthesized, interpreted, and collected data to develop a mind map or concept map; I reinforced this by relating concepts from the literature of internationalization, results of coding, and relationship propositions from the NVivo software (Zhao et al., 2016). I am optimistic that this process of mind-mapping led to a

strong correlation of key themes and prompted critical thinking, while identifying relationships among key components of data (Williams & Moser, 2019).

### **Reliability and Validity**

Qualitative researchers must address questions of the study's reliability and validity. Researchers must comply with minimal standards of validity and reliability by addressing components that determine the trustworthiness of qualitative studies or rigor for quantitative studies (Hayashi et al., 2019a). It should be noted that the functional criteria of these two measures widely differ depending on the research method employed (Dar & Mishra, 2019; Hayashi et al., 2019a; Rahman & Mendy, 2019). In the proceeding paragraphs, I presented the application of these concepts to qualitative methodology, specifically the case study designs as applicable to this contemporary study.

#### **Reliability**

Reliability is the level of consistency of a research process; the goal is to obtain similar results if the study is repeated (Hayashi et al., 2019a; Rose & Johnson, 2020b). Reliability in qualitative studies leads to dependability, which is the consistency of findings in similar conditions (Moon, 2019). In qualitative studies, reliability can be realized using a number of strategies although some overlap (Hayashi et al., 2019a). One strategy to ensure reliability in qualitative studies is to employ member-checking, audits, and by bracketing. I, therefore, used a systematic, reflective, and detailed audit trail for all the research processes applicable in this study (Hayashi et al., 2019a; Moon, 2019; Rose & Johnson, 2020b).

**Validity**

Validity refers to conclusions, uses, inferences, and implications that can be made from the results of a qualitative study (Fitzpatrick, 2019; Rose & Johnson, 2020a). To achieve validity in a multi-case study, a researcher must demonstrate integrity, apply appropriate data collection methods to study the phenomenon, demonstrate accuracy with data analysis, and ensure authenticity of findings (Fusch et al., 2018; Moon, 2019; Sundler et al., 2019). Validity leads to credibility, quality, and dependability of research results (Sundler et al., 2019). To achieve the credibility, transferability, confirmability, and authenticity of a qualitative case study, the researcher must accurately predicate the phenomenon from the findings (Cavaco et al., 2020). If the proceedings and results of a case study research can measure up to the validity criteria, then, the study is considered trustworthy. A trustworthy study has achieved internal and external validity, construct validity and reliability, and objectivity (Fusch et al., 2018; Rose & Johnson, 2020b).

***Credibility***

Credibility is achieved when researchers have confidence in the findings (Çelik et al., 2018; Daniel, 2019b; H. Liao & Hitchcock, 2018). To ensure credibility, I employed triangulation and member checking to corroborate findings. Member checking is accomplished by asking the participants to review the resulting transcripts to ensure the information reflected exactly what they said (Candela, 2019; Daniel, 2019b; Fitzpatrick, 2019; Johnson et al., 2020a). Member-checking is important to ensure that data are credible (Daniel, 2019b; Motulsky, 2021; Nassaji, 2020; Stahl & King, 2020). I achieved

triangulation by employing multiple data collection methods as I have highlighted in my design.

### ***Confirmability***

Confirmability in research is a condition with which the findings articulated in the study are traceable and reflect an accurate interpretation of the data while the study is free from biasness (Bass et al., 2018; Bush et al., 2019; Haven & Van Grootel, 2019; Kyngäs et al., 2020; McGinley et al., 2021; Nguyen et al., 2021). I achieved confirmability by preparing an audit trail, that is, periodically documenting the methodical and analytical proceedings to reach at the findings, conclusions, and recommendations.

Shufutinsky (2020) explained that confirmability can be achieved through practicing reflexivity during the study. Reflexivity is when the researcher appreciates their roles as a critical instrument of the study, therefore, has own lived experiences, interpretations, and paradigmatic influences, which can bias the entire research process (Bush et al., 2019; Daniel, 2019b; McGinley et al., 2021; Shufutinsky, 2020; Xerri, 2018). To avoid biasing the study process, I prepared a reflexive journal in which I systemically contextualized and documented the entire knowledge construction process, my assumptions, and pre-conceptual lenses of this research.

### ***Transferability***

Transferability refers to the applicability of the findings to other settings, contexts, situations, and groups (Bass et al., 2018; Carminati, 2018; Levitt, 2021). Transferability occurs when those who were not part of the study can freely assess and relate the findings



to their own experiences and contexts (Daniel, 2019a; Levitt, 2021; Maxwell, 2020). I achieved transferability by documenting a detailed information about the participants, criteria of choosing them, their number, their attitudes, the research context, the phenomenon of study, so that other potential users can determine if my research findings is relevant to their situations and possible generalizability.

To achieve validity in this study, I established adequacy of the methodology, the internationalization phenomenon, and engaged validation processes as explained in the above paragraphs. A combination of credibility, confirmability, reliability, and transferability led to data saturation and sufficient characterization of the internationalization phenomenon. Achieving validity therefore requires and depends on the appropriateness of tools, processes, adequacy of data, and thoroughness in analysis (Kyngäs et al., 2020).

### **Transition and Summary**

The purpose of this qualitative multi-case study was to explore the strategies that MVA SME managers use to expand into global markets. To identify these strategies, I took an inductive interpretation and in-depth understanding of managerial actions, aspirations, experiences, and motives towards the internationalization phenomenon. I selected managers of internationalizing SMEs, and I followed a serialized sampling process itemized by purposive case choice, criterion-based participant choice, and ensuring a census participation for each case. The sample-participant selection process led to thematic, data, and theoretical saturation.

To collect the data, I used several methods including observation, interviews, and company documents reviews. To ensure data saturation and successful inductive analytical process (data reduction, display, conclusion drawing and verification), I used methodological and data triangulation, which informed thematic categorizations. To gain study trustworthy, I ensured that the study complied with reliability and validity; thus, I employed a number of methods including triangulation, member checking, developing an audit trail, and preparing a reflexivity journal, to ensure transferability of findings.

In Section 3 therefore, examination included the applicability of Atac's (2005) theoretical lens to the SMEs by undertaking a qualitative study of five enterprises (Lwakatare et al., 2019). At the end of this survey, I identified and recommended relevant and appropriate approach that SMEs from SSA, which have similar business practices and mindsets, would employ for their internationalization.

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

In this section, I present the findings of the study and their potential application to professional business practices. I highlighted how the findings and potential actions could impact change, and bring about observable social change.

#### **Introduction**

The purpose of this qualitative multiple case study was to explore the strategies that SSA MVA SME managers use for global expansion. I examined five exporting SMEs in Uganda. To acquire the research data, I interviewed five SME managers and two follow-up assignees, made plant lay-out observations, and reviewed specific company documentations. The findings revealed strategies that the SME managers use for penetrating and expanding into global markets. The business leaders exhibited a strong belief and dedication to addressing intra-enterprise factors as a cradle of internationalization.

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

In this multiple case study, the objective was to address the overarching research question: What effective strategies do MVA SME managers use for global expansion? Using semistructured interviews, I collected data from business leaders of five MVA SMEs that are currently exporting in Uganda. I also reviewed key company documents like marketing plans, strategic plans, and operational plans for SMEs that had such documents and leaders agreed to share. Observations included participants' plant lay-out to examine the materials handling and movements practices; the intention was to

corroborate what leaders and their documents claimed, and whether plant lay-out addressed the time and cost elements participants' export ventures.

Using NVivo 12 for the data analysis exercise, I identified five thematic areas: (a) enterprise identification, (b) understanding the export product, (c) enterprise external related factors for export venture success, (d) intra-enterprise factors for export participation, and (e) global expansion strategies. The attendant thematic framework of the study table (see Appendix E) presents the above mentioned five themes and their respective major, minor, unexpected, or serendipitous areas.

### **The Case SMEs Studied**

In this section, I presented brief profiles (operational timelines, the export products, the nature of business relationships with the clients, and the export destination markets) of the five SME cases that participated in the study. In all the five SME cases, top managers participated in the interviews. Two of the participating managers could not complete the interviews; instead, each one of managers assigned knowledgeable departmental heads who completed the interviews. The two participants became the follow-up assignees. At the analysis stage, I treated their respective interview files as complete stand-alone files, thus, making a total of seven.

#### ***SME 1***

SME 1 has been operational for over 40 years. The business of the firm is to extract shea butter from organically nurtured shea nuts. The shea butter is unrefined (maintains a natural white color), has a natural smell, is rich in natural skin healing components, and keeps the skin naturally moisturized. Buyers of shea butter use it for

producing cosmetic products, hence a business-to-business (B2B) trade relationship. The enterprise started exporting to markets like The Netherlands, the United States, South Africa, India, Finland, and several other countries in 2000. I have referred participants from this SME as Business Leaders 1 (BL1).

### ***SME 2***

SME 2 started operations in 1994, and it began exporting in 2009. The enterprise manufactures natural herbs-based jellies that preserve, heal, protect, and cure human skin. The jellies offer alternative cosmetic products that do not have hydroquinone steroids for skin hyper-pigmentation. Its export trade is a B2B relationship, and it is exporting to a number of proximal regional countries including Rwanda, the United Republic of Tanzania, Kenya, Zambia, and Mozambique. In this study, I have referred to the business leader, who participated, as Business Leader 2 (BL2).

### ***SME 3***

SME 3 started by linking coffee farmers to potential buyers abroad in 2003. Later, the enterprise began exporting both roasted and green bean coffees to specialty coffee buyers. Specialty coffees do have a story behind the cup; where the buyers are concerned with how players along the value chain are treated, the origin, and the professionalism of baristas. The enterprise started exporting in 2011 to several export market destinations like; Europe, Asia, United States of America, Italy, and North Africa for green beans; and Switzerland for roasted coffees. In this study, I have assigned the business leader, who participated, a pseudonym of Business Leader 3 (BL3).

### ***SME 4***

SME 4 started business operations in 2005, and began exporting in 2006. The firm calibrates wet-blue hides that are used to produce leather products. Wet blue is a final long-lasting product from the process of tanning hides into leather. Secondary manufacturers, like shoemakers, calibrate their products from wet-blue hides. Therefore, the enterprise conducts a B2B business relationships with its clients in export destinations of China and Europe. I have referred the participants from this SME as Business Leaders 4 (BL4) in this study.

***SME 5***

SME 5 started in 2018 and started exporting in the same year. The enterprise operates a business of dehydrated and shredded tropical fruits and exports them to several export markets destinations like Middle East countries and Europe. Buyers of this enterprise's dried fruits are majorly distributors to final consumers in the export markets, hence a B2B business. Buyers of its fruits look for organically nurtured tropical fruits that are free of herbicides, and other chemical related applications. Table 1 below, presented the summary of my case SMEs' profiles. In this study, I have assigned the business leader, who participated, a pseudonym of Business Leader 5 (BL5).

**Table 1***Detailed Information about the Participating SMEs*

	Year of inceptive export transactions	Number of employees	Focus area	Active export market destination
SME 1	2000	51	Shea Butter	The Netherlands, the USA, South Africa, India, Finland, and very several other countries.
SME 2	2009	178	Herbal Jellies	Rwanda, the United Republic of Tanzania, Kenya, Zambia, and Mozambique.
SME 3	2011	60	Roasted and Green Beans coffees	Green Beans coffees Europe, Asia, USA, Italy, and partly North Africa
				Roasted coffees Switzerland
SME 4	2006	250	Wet-Blue Hides	China
SME 5	2018	16	De-hydrated value- added) tropical fruits	The Middle East, Europe

**Theme 1: Enterprise Characterization**

All the five business leaders from the sampled SMEs explained their businesses in terms of who they are, what they do, and why they are doing what they do. All the five BLs articulated the critical components of or uses of their products that their clients were looking for. They were indisputably confident of the source of their competitive edge in their contemporary destination export markets. For instance, BL3 explained the philosophy of their coffee business as:

To create the shared value to coffee farmers ..., that way we are ensuring that coffee farmers profitably own their coffees along the value chain for customer

satisfaction and social transformation. . . . focusing on sustainable livelihood, consumer satisfaction and protection, . . . we ensure a market driven system of coffee farm enterprises and organizations to increase household incomes.

BL1 expatiated that their business philosophy was to “produce shea butter for cosmetics and skin health of human beings. We extract this shea butter and other related products from organically nurtured shea nuts.” While BL5 emphasized, “We service our customers with fresh produce and de-hydrated (value-added) tropical fruits like mango, pineapple, banana, jackfruit, and the like, that are organically nurtured.”

Defining one’s business is a starting point in developing competitive business strategies. Atac (2005) emphasized that if a business leader can define the demand dimensions of a target market, then they can arguably develop and design appropriate product features for that market. To define a market is to map out why the buyers patronize a given product; the case of coffee above, for example, clearly shows how the business leader resonates well with its specialty buyers that are looking for coffees with a story alongside the value addition chain; hence the enterprise can ably provide traceability and place-of-origin to the customers. Its only logical that a buyer, of any product, always aspires to achieve that cognitive consonance (Ge et al., 2021; Xi et al., 2022), for which a desired product must comfortably address their needs and expectations, a condition that leads to satisfaction.

### ***Export Market Destinations for Our Products***

All the five BLs accurately articulated not only where they exported their products but also articulated the demand dimensions of those target markets. BL5



explained that “the fresh produce is mostly exported to the Middle East, dried jackfruit is mainly exported to Europe, and other dried fruits are more regional and local.” BL4 revealed that “we export our wet-blue hides to Italy, China, and even countries like Pakistan”; while BL1 intimated, “We do a lot of export to the Netherlands, the United States of America, South Africa, India, and Finland.” BL4 further explained that “we produce and supply wet-blue hide, which is semi-leather, to our export markets’ buyers that are ready to manufacture a variety of leather products.”

Andersson et al. (2018), Ashna Chandra et al. (2020), Dabić et al. (2020), Morais and Ferreira (2020a), and Rosário and Raimundo (2021) emphasized the role of defining the market’s needs, expectations, and practices as strategic pillars to developing competitive strategies, and demystifying the development of an appropriate product. Therefore, given the market knowledge, for both market destinations and demand dimensions that BLs demonstrated, I have no doubt that they are focused to satisfying their clientele through appropriate product dimensions and market access procedures; this approach is relevant to both domestic and international markets because they all host human needs.

## **Theme 2: Understanding Our Product**

The participants identified the unique aspects or features of their respective products that their respective buyers look for. For example, BL3 asserted that “we comprehensively know our product, we can tell the source (origin) of coffee, its test and cup attributes, etcetera; effectively serving our markets with specific attributes they are looking for.” BL2 reiteratively confirmed that “our cosmetic herbal jellies reduce the use

of hydroquinone steroids for skin hyper-pigmentation.” BL1 asserted that “our shea butter has the right smell, the ability to moisturize the body, has skin healing properties, and cause the glowing appearance of the skin after applying it.” BL3 mentioned so many unique attributes:

Coffee buyers who are usually roasters, are specific about the “story behind the cup,” that is, the origin (where, what altitude, how, by who, what varieties of coffees from there, which region, how far from the equator, the soils..), they also focus on the impacts of coffees to the society, the children, and the disadvantaged, all of which entails the type of stories that roasters are looking for.

BL4 pointed to the fact that “our wet-blue hides are semi-ready, ready to convert to a variety of leather products, however, it lasts longer and unaltered in stores.”

In his BMS theory, Atac (2005) explained that management of an enterprise must put in place a mechanism of studying the target market’s NEHOs, so that it can synchronize those market’s demands with the QOTCs dimensions of its product offer. The knowledge about the enterprise’s product offers to their respective export markets, which the BLs have demonstrated, confirm the competitive thinking involved in succeeding to expand into export markets. A business leader must expend considerable efforts to comprehend the key attributes of their offers, for which they must compare with the demand dimensions (NEHOs) of the target markets.

BLs, therefore, must be ready to not only analyze the critical components of their products but also to prepare to adjust them to the demand dimensions of the target market. Mastering the product and demand dimensions’ synchronization of an identified target

market, is a recipe for successful export market penetration that can accelerate global expansion. A business leader, of any export aspiring business, will have to develop a mechanism that identifies potential export markets, conduct a thorough target market study for the type of needs and expectations, and assesses the enterprise's internal capabilities develop and pursue a robust global expansion strategy. This argument was also advanced by Rakshit et al. (2022) when they argued that an SME can penetrate, participate, and operate sustainably in global markets if it conducted thorough target market studies.

### ***Who are our Customers in the Export Markets***

The subtheme concretized the need for business leaders to profile their potential buyers in the export markets; this focused on understanding their core needs, expectations, and purchase decision drivers. In this study, all BLs expressed significant knowledge of their current buyers' NEHOs that drive their purchase decisions and behaviors. BL4, for instance, intimated that the international buyers of the company's wet-blue hides do also supply leather products manufacturers across the world; therefore, BL4's buyers can keep the wet blue hides in a store for over a year without altering the quality, which enables them customers to service instant orders." BL3 emphasized that "our specialty coffee buyers look for traceability journey of coffees from the farm to the cup, they look for uniformity, consistence, and coherence; thus, we supply those features by testing at cupping." BL2 resonated well what drives their business:

Our buyers are looking for natural beautifying and curative jellies powered by natural herbs to avoid using hydroquinone based jellies that can create health

related problems. Our product, therefore, can cure skin infections, maintain the skin as it is supposed to naturally be, and protects from skin related ailments. Our jellies are strictly herbal based. Given the advantage of Uganda's natural productive soil that can produce a variety of natural herbs, we can readily obtain herbals that preserve, heal, and protect human skin that we concoct into jellies. BL1 emphasized that "our buyers look for shea butter for cosmetics, so that they can massively produce and commercialize cosmetics products from organic natural shea butter."

In the BMS theory, Atac's (2005) emphasized the role of segmentation and niching as critical market approaches to competitive global expansion strategies. While Morais and Ferreira (2020a) and Roque et al. (2019) theorized the role of external pull factors in developing international businesses. With non-tariff barriers aside, export market penetration can occur if potential buyers get to know the availability of a product that best addresses their NEHOs; such knowledge can be expedited if the enterprise engages in marketing activities of identifying who the potential buyers are, their NEHOs, and informing them of how its product offer can ably address their NEHOs. Therefore, for the business leader to significantly expend efforts to profile its potential export customer, constitutes a reliable approach to developing a focused global expansion strategy.

### **Theme 3: Intra-enterprise Factor-based Strategies for Export Participation**

Theme three of the findings of this study focused on the critical analyses of the intra-enterprise organization, the management function, the business functions of

marketing and production, and the managerial capabilities of the business leaders to build an efficient operational strategy for internationalization. Atac (2005), Zhu et al. (2020), and several other firm internationalization theorists emphasized the role of enterprise internal arrangements, strengths, and managerial competencies to prepare an enterprise for a sustainable internationalization venture. Several internationalization theories embed these firm's intrinsic internal factors as push drivers for internationalization. The subthemes under theme three, therefore, explained the extent of readiness and focus that participants exhibited as they prepared and managed their enterprises' internationalization ventures.

### ***Managerial Efficaciousness***

The subtheme demonstrated the business leader's comprehensivity to planning, running, and sustaining a profitable export venture of an enterprise. The subtheme featured issues of export experience, export product dimensions, adequate working capital, human resources, and raw-materials availability and factorization.

**Business Leaders' Exporting Experience and Drive.** Most of the BLs didn't have any export experience when they embarked on the venture. For instance, BL2 stated that "given my humble academic background I didn't think of international markets at all, but when they introduced the East African Community market protocol, we started thinking of giving it a try since the countries are proximal to Uganda." BL5 stated that "when I came into this business, I had not done export before. My prior business exposure was in importation. Every effort we make to sell anything come with a lot of perseverance and hard work including those export opportunities." BL3 confirmed that "now that is the good thing with export experience, you see things working perfectly."

The business leader's export adventure is usually driven by their export experiences prior to undertaking it; they have either worked with an exporting business before or they have attempted and failed with their own enterprises before. Internationalization theorists, like the born-again globalists (BAGs) Metsola et al. (2020) and the born globalists (BGs), Weerawardena et al. (2019), characterized managerial export experience as a key factor to exploited international transactions. They argued that managers can embark on the internationalization venture based on their prior export experience; business leaders' internationalization venturing could also be driven by knowledge, innovation, and technology.

Experience comes with learning, and it is intrinsically owned by the subject. Therefore, business leaders that have had some exporting episodes, even when they crashed, can embark on the same. Business leaders that are keen on intuition and learning can ably build that internationalization drive as a key intra-enterprise push factor to exporting. Focusing onto the research question of this study, developing and acquiring export experience can be a powerful global expansion strategy for business leaders.

#### **Co-ordination, Running, and Building of the Business Functions' Tasks.**

Some of the BLs exhibited significant skills and dedication to coordinating and building their enterprises' business tasks. BL1 stated that "optimality requires accurate and dedicated coordination of all functions involved, and high-level concentration at every stage for quality control, ... we ensure that our product comply with the standards of the regulator to deny chances of batch rejection." BL2 explained that "we are producing standardized products for both export and domestic markets, we use the same production

lines unaltered, same inputs, and same systems. ... some sub-processes are manual if they need human judgement, like feeding the raw-materials, packing ...” BL4 expatiated that “to have good returns you must have a well-trained workforce to avoid cheap labor at the expense of the product quality.”

Atac (2005) explained that a business leader must plan for the tasks to carry out production and the respective resources, execute that plan accurately, and must control how resources are used along the processes. To efficaciously carry out the above three functions, a leader must engage a number of personal managerial activities like communicating, conducting audits, etcetera. When the BLs, who participated in this study, explained how they built skills and expertise in the relevant managerial activities, they portrayed a platform for crafting strong intra-enterprise strategies for global expansion.

**Determining the Product Dimensions.** Almost all BLs expressed knowledge of how they can configure their export products to suit the export markets’ demands. BL3 explained that “sourcing is innovative because of considered factors like altitude, the soils, and the variety of coffees. At the roasting level, we attend to temperatures, time spent in the roaster, the blending proportions to produce varying coffee blends.” BL1 intimated that, “I was once a manager at Mukwano Industries, another company that produces similar products, like soap, oil, butter, etcetera, so I have a wealth of experience in configuring products vis a vis the market needs.” BL1 also said that “call this conventional production now we’re going to add good full value. So very soon we shall have full graded shea butter, so that will be a different line for hygienical full grade.”

Atac (2005) argued that a manager must install the right QOTCs to produce the desired product dimensions or features as expected by the potential market. Mostafiz et al. (2019) argued managers to study the international opportunities, re-orientate the production function to calibrate the appropriate product. Therefore, the participants expressed a deep appreciation of having accurate knowledge about their products' dimensions; BLs' knowledge appreciation showcased some of the reasons why they have been successful in their respective export markets. Developing and calibrating a product that addresses the target market's needs, the NEHOs, is a critical export market penetration and sustaining strategy for an enterprise.

**Working Capital Availability.** All the BLs expressed dependable ways of having a constant flow of working capital for their businesses. BL3 explained that "local markets keep the enterprise liquid, since they pay within a short time, and we try to make the payment period as short as possible, but we also have partners who support numerous components of our business." BL2 asserted that "our international customers paying upfront, so we use that money to finance the manufacturing of their orders." BL4 explained that "we get loans from foreign banks that give very low-interest rates loans while the exchange rate is favorable as we convert into local currency." BL1 implied that "we have local retailers who buy from us and resell domestically; we also supply to supermarkets across cities. So, we have flows of income for daily use."

It should be noted that availability of working capital counters numerous export constraints, especially those that require instant cash disbursements. The resource-based view (RBV) theorists, Alon et al. (2021) and Lee et al. (2019), observed that firms which



own inimitable resources can craft an international competitive advantage strategy; they have potential to appropriately combine their resources, transactional competences, and the mastery of their unique environmental and historical contexts to favorably operate in international markets. From these fundamental unmaskings, I can assent to the fact that having dependable streams of working capital constitute a critical global expansion strategy.

**Sourcing for the Consistent Supply of Standard Raw Materials.** All the BLs expressed their deep-seated concern of constant supply of quality raw materials. All BLs argued that without the right quality of raw materials their consequential export products' qualities would be compromised, which would affect their products' sustainable marketability. From the findings, I concluded that the BLs had made sustainable precludes to ensure quality supply of raw materials.

BL3 explained that “we keep the fees high for two reasons when coffee doesn't dry naturally and instead it is dried through these machines its quality drops, we also want to encourage farmers to dry their coffees naturally for better prices.” and “we purposely train our farmers to keep quality; farmers know what to do, and that's how we keep our buyers for a long time.” BL2 stated that “we have a very healthy relationship with our farmer-suppliers, we have an unwritten understanding but very effective work-out, for which they supply their herbs and get paid a known price.” BL5 explained that “we have a strong network of smallholder farmer out-growers that supply the fruits, however, we are very strict on quality specifications, ... we are also in the business of maintaining relationships with our farmers for quality and dependable supplies.”

BL1 explained that “we have backward integration and partnerships with our farmers. We train them in special-particular organic farming. We buy in bulk and pay cash on delivery after farmers’ supplies have complied to the standards, so they supply to us.” BL4 explained their raw-material sourcing procedures as “we engage a tight process of selection, and we prefer a hump less hide to avoid cutting off that part and creating a hole, such hides are not marketable. We then test them before batch numbering them for traceability.”

Saridakis et al. (2019a), the international entrepreneurship theorists, argued that a firm must focus on the critical role of internal resources, including the managerial resource, to improve their product offer. While Atac (2005) reiterated the role of efficacious managerial activities in sourcing the desired raw materials, as this would enable the enterprise to calibrate the market desired product. Developing effective raw material sourcing activities, therefore, can enhance the enterprise’s ability to manage quality throughout the transformation process; raw material sourcing can be a critical component in developing an efficacious global expansion strategy.

**Developing the Requisite Human Resources.** BL3 vehemently expressed their emphasis on the issue of human resources:

It all starts with hiring trained personnel, subject them to continuous training for re-calibration and deeper understanding of the industry, the product attributes, and the capability to identify, appreciate, and comment on them. Our engineers are fully skilled with expertise to rightly run the machines; testers are trained experts, who are able to identify those natural calibrations and differences in coffees with

their tongues, and in most cases their results minimally deviate. Because of the periodic automation of transformation machines' software, we do refresher training for the operators.

BL4 had contrasting views about human resource quality and outputs; this is because of the nature of their product, the wet-blue hides, which interface with so many chemicals during the transformation processes. BL4 explained the employee reality issues at the production plant as thus:

Given the nature of our business, we attract school dropouts that are willing to withstand the working conditions; those who qualify are expensive. We think that we can train our own people, but training a senior two-three drop-out the basics of chemistry is very painful and frustrating. Because these are the type of employees who can even eat something without thoroughly cleaning themselves.

So training, such people with a strong 'I don't care about tomorrow as long as it is today' makes our lives miserable, yet these are the ones that are available to draw from. The sections supervisors are maximum S6 level, but it takes a lot of patience to train such persons to the extent that out of 100 you remain with two in a period of three years; they think that they have mastered activities after two months. Overtime, I have come to appreciate that someone trained on job may not make a report but will produce. One time I did a test, we use ammonium sulphate and salt. I changed salt and put it in ammonium sulphate bag, and the worker used salt instead of ammonium because his mind tells him that particular bag carries salt. So, one has to be checking all the time.

BL5 explained his employee status as thus:

Given the profile of Uganda's population, which is predominantly youthful, we work with youths a lot, and a lot of them leave us to pursue higher education.

Therefore, we try to play our part to motivate them, train them in food safety management system, rotate them as we find it necessary, but because we do not bind them, and we're not bound to do that, some do not stick around with us. So over time, there's definitely people who enjoy working with us, who share the same values as our company and will stick around.

Atac (2005) highlighted the need for the business leader to plan, acquire, and allocate the right quantities, qualities, at the right costs, and in a timely fashion of human resources to run the business tasks of the enterprise as a competitive strategy of developing that critical push factor. Succeeding in acquiring, training, and retaining the desired human resources, is instrumental in strengthening and sustaining an enterprise's internationalization venture. Business leaders, therefore, must expend focused efforts to develop the human resources component as one of the strategic pillars to internationalizing their businesses. Plausible human resources lead to numerous benefits in the export equation of an enterprise.

### ***Operation Strategy Crafting Processes***

An effective operation strategy begins with concise definition of the enterprise's business, that is, what the enterprise produces and for what specific market. BL5 defined his business as "we're in the business of selling de-hydrated (value added) tropical organic fruits." While BL3 demonstrated that "we are laboring to increase or expand our

market for roasted coffees because that's where we can make more money, and together with premier grades of coffees we can fetch significant revenues.” BL3 further emphasized that “and we are looking to up scaling ourselves in the roasted coffee sector across the world, to supply diverse range of markets including African continent.”

According to Atac (2005) and Efrat et al. (2017), enterprise managers must craft operational strategies with which they determine the critical tasks, processes, and capabilities a firm must engage to produce for the target market. The operational strategy charts ways of developing production and marketing capabilities to appropriately synchronize product dimensions (QOTCs) with the target markets’ needs (NEHOs). When some of the participating BLs documented their intentions to penetrate and serve targeted market segments, they were documenting their respective operations strategies; an operations strategy maps the capabilities a BL is intending to develop. Actualization of such mappings can propel BLs to global expansion.

### ***Production Function's Tasks***

Atac (2005) and Makaya et al. (2021) ascertained that a business has two functions; the production and marketing functions, which define ‘what product’ and ‘for who’. A firm’s ability to innovate and create the target markets’ needs-satisfying products, leads to an enduring market acceptance, performance sustainability, and potential market domination. A business leader, therefore, must develop these functions to produce the desired product QOTCs to address the targeted market demand NEHOs. In the proceeding paragraphs, I presented the evidence from the BLs, as they spoke about their production functions’ tasks.

**Product Quantity Issues.** BL1 explained that “we are installing a new plant that will adapt a continuous flow production mechanism; we shall pack the full grade product. We use a heating mechanism that makes it soft and ready for cosmetic purposes as expected.” BL4 explained that “so, we use chemicals to swell the hide to split it up, then take it through the system to turn wet blue. We run a batching mechanism to avoid mixing hides from different sources.” While BL5 claimed that “so, we essentially serve our customers with what they want, for example, dried pineapple, mangoes, etcetera., because we have the flexibility and the agility in our production facility.” For his part, BL2 intimated that “we adapted a flow method since we produce a more or less standard product for both markets, with minimal changes. These changes occur at the periphery of the main production path, at the later stages of product output.”

BL3, because his enterprise supplies two products to different export markets, had this explanation:

Our product line is efficient, we can produce a 7 tones container within three hours, and it operates both days and nights, our production technology removes an extra layer from the green beans, so that we are able to get the clean green beans. The vibrator screens the bean sizes, where the biggest coffee beans stay and the smaller ones continue to the next screen; it has those micro-lenses that are able to identify the colors, so that its able to screen by color. Our roasting plant is time and temperature sensitive; it preserves and balances that aroma, which is a combination of floral, honey, etcetera., that consumers are looking for. The laboratory consists of the coffee flavor tester's turning wheel for our cupping; the

quality of coffee is a combination of the screen, the color, and the test of the cup.

We have also automated our production processes up to 90%, and we intend to continue upscaling to where it is practically possible. We use a batching processing mechanism; there are times when we have several batches to processes, so we processes batch by batch, and flush the system between them. The plant has a guaranteed lifetime of fifty years without major breakdowns. So, what we usually concentrate on are the minor issues that we find striving.

We roast according to customers' specifications and their unique demands, and for blended coffee the ratios change from customer to customer. In fact, the usual way we fulfil our customers' specification is through their participation; we sit with them and prepare the coffees; they test the coffees for about three days until we get the right combination, roast, blend, and attributes, and then we engage production of the order.

Atac (2005) defined product quantities as the volume, the color, the smell, etcetera., of a product that customers' NEHOs demand. Like Makaya et al. (2021), Atac reiterated the need for a business leader to build critical tasks of their production functions that are capable of producing the right quantity dimensions of a product. So, all exporting SMEs that participated in the study were critical about the quantities of their products. The quantity sensitive mindset that BLs expressed explains why they have been able to sustain their market performance. Building the requisite product quantities is a strong competitive strategy that can propel an SME to internationalization.

**Product Quality Issues.** Atac (2005) defined product quality as a process of analyzing the product features, and develop quality standards, features, measures, and control procedures to ensure the production of the desired QOTCs. An enterprise should build the requisite tasks to address the quality issues of a product. All the BLs that participated in the study expressed compliance to quality issues as desired by their export market consumers. The BLs have had their products, production processes, and export batches certified by concerned certification bodies; ultimately all BLs had fully complied to the certification demands of their clientele.

BL3 appreciated the role of having compliance certificates, which are required by their market destination, but decried the cost of obtaining and renewing them. BL3 mentioned that their export markets are sensitive to the efficacy of the production processes, yet BL3's buyers, in the export markets, have a duty of protecting their domestic consumers' safety as required by the host country laws. BL4 appreciated the acquisition of certification from Europe for British Retail Consumers Certificate (BRC) and America for FDA (food and drugs authority); the compliance enabled BL4's enterprise to access the export markets.

BL1, BL3, and BL5, whose products are associated with organic inputs, appreciated their organic compliance certificates despite the cost of obtaining and renewing the certificates. These BLs feel empowered to access several export markets for more revenues. Once BLs' export products achieve acceptance in their respective destination markets, the BLs must maintain and sustain supply, and can ably access other markets that subscribe to such quality measures. For example, BL3 explained that



“because we are Fairtrade and Rainforest Alliance certified, we can not only freely access their members but also preserve our operational environments to ensure Eco friendliness as required by the standards.” While BL5 explained that “we just went through our audit for being organic certified. So, combining organic and food safety certification is a real competitive advantage for us in the export markets.”

Buyers in export markets are sensitive of the processes, practices, and logistics in countries of origin; yet they have a mandatory duty of protecting export markets’ final consumers, therefore, compliance certifications guide value adding SMEs to ensure quality procedures and measures, along the transformation cycle. Developing quality standard tasks for an SME, therefore, is a critical competitive strategy that I cannot doubt its efficacy to enhancing an SME into global markets. Business leaders, therefore, must use quality standards for compliance as strategic export market entry endeavors.

**Compliance to Certification Standards.** Certification standards are intended to guide participating producers to comply with what is acceptable in the industry (Atac, 2005); producing within those requirements assures the market of consistent conformance to customers’ NEHOs within the contexts of market standards. The BLs of this study explained both the advantages and constraints of complying to standards; the BLs decried the cost of obtaining and renewing certificates, and the need to have both host and exporting countries’ standards. The BLs expressed shades of relief and success, as complying to standards gives them export market access and sustainability advantages. Host countries’ authorities’ acceptance of market access eliminates doubts of compromised products in the eyes of customers.

BL3 confirmed that “because we are Rainforest Alliance certification for which ecofriendly environment is critical, we have to comply.” BL4 explained that “we have a recall mechanism for the container, even when it is still on the vessel, when we detect a problem or if we get customer feedback, and we rectify that problem.” BL4 also confirmed that “we normally follow what our buyers wants, for example, a wooden pallet, a certificate of fumigation, etcetera.” BL5 vehemently claimed that “we produce what our export customers wants as long as it's not detrimental to the food chain and certified food safety standards.” While BL1 fervently asserted that “to guarantee repeat purchases, the shea butter must have that natural organic smell that customers are looking for; a different smell may create suspicion of product adulteration and loss of a purchase forever.”

BL4 was concerned that “selling our products to export markets is becomes expensive, as we must obtain and comply to export market certifications, in addition to Ugandan certifications; we spend more 200 million shillings when we first appear and then renewing the certificate.” BL1 reiterated that “when we adopt a given country product quality standard, we must also look at the local standards requirements like the 'Q' mark certification from UNBS.” While BL3 asserted that “the regulating body here in Uganda, UCDA, has instituted quality standards, specifications for each grade, so we have to present a sample for every batch to test for compliance before exporting.” And “our consumers have not had nasty experiences, as we strictly observe and are consistent towards their expectations.”

The findings indicated that exporters must address and overcome two to three layers of quality standards; complying with all the quality standards huddles is not only costly but also is time consuming. The most satisfying and hopeful aspect is that compliance to all the quality layers assures the BLs of diverse export market access; compliance also enhances BLs chances to learn the export market dynamics to the acceptable detail, and sustainable presence in these markets. Accessing export markets through quality compliance enhances organization learning, which is a powerful strategy to creating such an important push factor to internationalization. Learning in an enterprise has been strongly advocated by several internationalization theorists like Johanson and Vahlne (2009), Roque et al. (2019), and Baier-Fuentes et al. (2019).

**Product Cost Issues.** Atac (2005) highlighted the need for managing operational or production costs, so that the resulting product's price is affordable by the target markets. Controlling costs of production does not only consider raw materials and their inbound logistic costs but also does consider the transformational and market presence costs. Evidence from the study showed that almost all BLs were concerned with production and market access costs. In fact, BLs appeared to work deductively to their acceptable cost frameworks.

BL3 explained that “we have workloads that emphasize day production, during solar active hours, and only work less or attend to the inevitable work during the night; we also choose candidate batches carefully to reduce the number of machine flushing.” BL2 expatiated that “we engaged foreign-distributor approach after we realized that running a fleet of vehicles, in addition to employing drivers, vehicle depreciation,

servicing, mandatory dues, and other overhead costs would unnecessarily escalate the costs of production and marketing.” While BL5 cautioned “to enjoy the export business, we must manage costs of production, which would ably provide for competitive pricing in the market arena.”

BL4 explained that “whereas regulators and the law enforcers would push for recycling, producing a ton of chrome through recycling can buy 20 tons from India or China, so we continue to import from external sources.” And BL3 clarified that “we capture and analyze production data daily to determine acceptable costs; the practice of data capturing has happened overtime, and we have learnt a lot from it, especially benchmarking what is acceptable.” Therefore, managers must appreciate that some costs need not be passed on to the buyers; such costs could be categorized as sunk costs, whose indemnity could be realizable or not. Managing production and marketing cost to minimally acceptable levels is a strategic tool for flexible pricing in both domestic and export markets; business leaders should learn to minimize production costs without compromising product quality standards. Minimizing costs could be one of the strategic tools in building global expansion strategies.

**Product Time Supply Issues.** Availing products as and when customers need them is a competitive action that can create a competitive advantage for a business leader. Evidence from the study pointed to the fact that all the BLs had put in place measures for absorbing time shocks of production and supply. BL4 explained that “we do not run out of chemicals, and we adapted first in, first out chemical handling policy,” BL1 explained that “because harvesting of shea nut is seasonal, we buy and keep inventory, this year we

have bought a lot of shea nuts, and processed a lot of shea butter, which we keep for eventual orders.” While BL4 demonstrated that “the hides are kept in the yard over there, ready for export, and they can stay even for full year.”

Atac (2005) and Makaya et al. (2021) argued that if a business is able to create and avail the target markets’ needs-satisfying products in time, the business can enjoy an enduring market acceptance, performance, and potential market domination. The theorists advocated for effective material handling, managing the inventory, and adopting effective warehousing systems. Thus, saving time in production and supply plus reflecting time economy in the market, addresses timely product availability to the customers.

Availability and timely access to products for customer NEHOs, endears the brand to its target customers. Business leaders, therefore, should consider timely product availability as one of the strategic push factors that can ably push them to access export markets.

**Environmental Sensitivity.** BL4 demonstrated that “because our waste ratio is 40-50% of every hide, we had issues of waste management (wastewater, and solid waste), so we obtained a license of producing gelatin from the solid waste, and we invested in the machinery.” And “we use a lot of chemicals, and we apply a lot of water, which must also be treated of those chemicals. Treating water is still a challenge.” BL2 examined that “we are sensitive of the general environment; we majorly produce during the night to avoid interfaces and interactions with certain insects. In fact, one of the component ingredients for our jellies is honey which attracts bees.”

Being sensitive of the working and general environment is a potent strategic tool that can have wide scoped returns to the enterprise. Certification for export markets are

strict on the general impacts of production to the environment given the current concerns of climate change, habitat preservation, and sustainability for the wellbeing of humanity (Senge et al., 2010). Therefore, observing production environment, through environmental compliance and certification, is a strong strategic tool that business leaders could use to develop strong global expansion strategies.

**Production Challenges and Risks.** There are several challenges and risks that BLs interface during their production for exports; some of these challenges are incidentals within the firm while others are externally engineered. For instance, BL4 explained that “this is the most dangerous chemical called ammonium sulphate when one gets exposed for long gets cancer of all types, and when you are dealing with lowly educated people you have to go slow for them to understand.” BL3 explained that “we have issues of power supply even when we have solar, our solar system doesn't have storage capacity. Thus, with batching method, we waste time, flushing between batches, and losing the WIP roasting because the pan can't open.” And BL5 explained that “we have challenges with quantity, given what the market expects, simply because we're limited by our processing capacity not fruit supply.”

Atac (2005) explained that it's the duty of a manager to develop the operational strategy for an enterprise, and adapt activities that plan, acquire, execute, and control what happens in the enterprise. Henceforth, a BL must provide cushions, backstops, and alternative actions for such eventualities. Therefore, to develop adequate global expansion strategies managers of aspiring SMEs must meticulously think, plan, and

provide for such occurrences. If left to natural wills, challenges and risks occurrences would affect the costs and timely availability of products in the export markets.

### ***Marketing Function's Tasks***

Atac (2005), Pasamar et al. (2019), and Makaya et al. (2021) demonstrated that a business has two functions; the production and marketing functions, which define 'what product' and 'for who'. A leader's ability to innovate and create the target markets' needs-satisfying products leads to an enduring market acceptance, performance sustainability, and potential market domination. Theorists recognized the criticality of production and marketing components of a business towards achieving efficiency, innovativeness, and making money. A business leader, therefore, must develop the production and marketing functions to not only produce the desired product QOTCs but also to address the targeted market demand NEHOs in time. In the proceeding paragraphs, I presented the evidence from the cases' BLs, as they spoke about their market functions' tasks.

**Marketing Bournes (Intentions) for Export Markets.** Evidence from the study revealed that all BLs that participated were keen at nurturing an efficient marketing arm of their enterprises for profitability and strategic competitiveness. For example, BL3 explained their marketing function as:

We have a product list/catalogue. We make available all those conversations electronically, and we have translated them in numerous languages like Italian, Arabic, and Chinese. So, this saves a lot of time, and we have timely update of our time bound price offers that we frequently give to our potential buyers. So,

this guides their plans of purchase accordingly. We also share with them our stock status so that they know what is physically available and can adjust accordingly.

BL5 explained that “there things that we deliberately do like maintaining an online presence; online presence is core of our marketing strategy, and that's how we get to customers.” He further explained that “we keep building a database by either buying data or organically researching, and we push out marketing content.” BL1 claimed that “U.S.A is the most profitable market in all our export markets, there are other countries to which you can go and get the difference.” And “they just say, I have seen from the website or from your email, I came across this and I learnt that you have a factory dealing in organic shea butter.”

Atac (2005), Kachouie et al. (2018), and Martin et al. (2020) explained the need to develop marketing function tasks to enable a business leader to communicate, distribute, and identify needs of the target market. The efficacy of these tasks would be tested by the leader’s ability to secure orders from the targeted market. Kaleka and Morgan (2019) asserted that if an enterprise is to enjoy superior performance and achieve effective differentiation and cost efficiency it must first develop its marketing tasks. From the theorists’ assertions above, they seem to agree that marketing tasks are deeply embedded in the firm’s operational culture. Therefore, marketing tasks’ strength is such a tactical and strategic component that leaders ought to develop. It does not only help to push the product to the export markets but also to collect market related information including the potential customers’ NEHOs. The manager is able to use these data for precision productions.



**Distribution Channels.** BL5 explained how they perceive their distribution network, he claimed that they feel a lot more empowered to trade with proximal countries like Kenya, Tanzania, Rwanda, Congo, etcetera. because of similar business practices and challenges. BL3 decried a hegemonic approach that big players in the coffee industry practice; big players look for country representatives who would do the sourcing and preliminary processing for them. Whereas the practice serves the purpose, it disadvantages smaller SMEs, as those masters shower the sector with a lot of resources, which deprive SMEs of sizeable supplies. BL3 lamented that “even in Switzerland where we have succeeded, we send our coffees without labels, we actually don't know what happens thereafter.”

Atac (2005) observed that an enterprise can command a strong competitive stance if it becomes a monopoly, it can monopolize the sources of supplies, the distribution channels, and continuously innovate to improve its product features. It should be noted that, distribution channels play such an important role to timely avail products in the export market; therefore, strong and significant expansion into global markets would depend on strong and efficient channels. Business leaders, therefore, must provide for them as they develop global expansion strategies.

**Sales Literature.** Participants expressed weakness in developing the sales literature task because most of their transactions are B2B. BL3 explained that, because they have been certified by the custodians of product standards, the enterprise is registered on certifiers' platforms onto which potential buyers flock to pick relevant information. BL1 explained that they provide product information to their buyers, but

because they are B2B buyers, they tailor that information in accordance with the aspirations of their ultimate consumers.

Sales literature is, basically, written materials through which an enterprise informs the arget market about the product or service characteristics and availability (Atac, 2005). Sales literature supports the marketing strategy of an enterprise, and it strengthens the communication capabilities. Surely, providing product information to the potential buyers need not be over emphasized; it serves a plethora of purposes including the nature of product ingredients, the source, availability, etcetera. Business leaders should consider this task a significant tool to enhance global expansion.

**Promotion and Communication.** Participants had mixed feeling about this task, however, BL1, BL3, and BL5 trusted and participated in trade fairs, expos, exhibitions, and conferences. They intimated that they got chances to present their product, either through samples or sales literature, to potential buyers that attend such fora. Other leaders practiced precision adverts, that is, designing an advertising strategy depending on the buyer's specifics. Other BLs expressed satisfaction with their internet presence strategy, where they use emails, websites, and social media to push their product messages. For example, BL1 explained that "we engage in international expos, and do online advertisements, and referrals; we send emails, then receive referrals by friends or by existing customers in our contemporary export markets or countries. We participate in global trade fairs for organic shea butter.

BL3 explained that they subscribe to different coffee related associations and certification schemes as well like Fairtrade, Rainforest Alliance, etcetera. Such schemes

are mandated to publish information about their certified products and the respective producers. BL2 explained that their promotion is motivated by the competitive decisions a retailer must make, as they make choice on investing the same amount of money into other fast moving products other than our jellies; we, therefore, have to help our distributors by creating a pull-demand through a number of promotion activities.

Atac (2005) elaborated that promotion and communication demonstrates the relative worth of non-mass media in contacting potential buyers in target markets; it stimulates instantaneous buying behaviors. Creating short, medium, and long term demand for export product is an important aspect for sustainable internationalization; therefore, business leaders should expend reasonable efforts to identify and develop the most effective promotional approach given the nature and dynamics of target market. It's such a potent tool that leaders must provide for in their globalization expansion strategies.

**Price Negotiations, Quoting, and Customer Inquiries.** BL3 explained that “we have a desk that handle inquiries from different customers. Although our markets are segmented, their inquiries can be handled at one desk. Once raised, inquiries are channeled to respective targeted response persons.” However, BL2 had different perspective about how they handle their potential customers’ business inquiries. He explained that the best approach would be a functioning and interactive website, which they do not have. Therefore, the best approach would be the borderless social media; other media can be too expensive to both manufacturers and traders. However, they hold complaints and complements line specifically for customer feedback. BL4 explained that

“we get feedback about what we have sent vis a vis what is expected or what was expected.”

For price quoting and negotiation, BL1 had this to say “our prices vary depending on the bargaining power of the buyer. When someone buys in bulk the prices will also vary; there is room for price negotiations.” And “price negotiations convicts our buyer to consider us as being fair, and therefore, build long-lasting relationships for repeat businesses; that's why we are able attract a number of customers in these export countries.”

Atac (2005) defined this task as a way of determining the final selling price of the export products plus preparing quotations. Atac argued that an enterprise should develop and adapt standard procedures for pricing and quoting. Price being the only market mix element that generates revenues for the enterprise, it should be given the attention it deserves, especially for an internationalizing environment; there are several hidden challenges that can impede profitable pricing, which a business leader must observe. Therefore, leaders should give this task the attention it deserves, and treat it as a critical component in the global expansion strategy.

### ***eUtilisation***

Management should identify where it can apply ICTs to enhance its competitiveness and dominate its market (Atac, 2005). Contemporary SMEs would not find this difficult because of the extant globalization efforts in every sector, which are supported by ICTs, internet, new business practices like outsourcing, etcetera. (Kromidha & Robson, 2021; Teruel et al., 2021). In the proceeding paragraphs, I have presented the

vital responses from business leaders that participated in the study about their perception, use, and application of ICTs in their organizations.

**ICTs and Production.** The BLs were optimistic about the use of ICTs to enhance their production functions' tasks. For instance, BL3 explained thus "ICTs help us in perfecting our coffee dimensions during roasting, blending, packing, batching, and maintaining levels of moisture; we use a software that activates sensors and then actions on the processes as per the program fed in it." And "to attain that precision required in our coffee, ICTs are critical, for example, product traceability and the QR codes to help our customers to ascertain the authenticity of the coffees."

BL3 further explained how ICTs have been instrumental to integrating subprocesses, thus "we have a customized system that can only be accessed by those who must. The system benchmarks our process flows, right from when coffees are delivered into the enterprise, through to packing in the export-ready stores." BL1 wished that "product dimension improvement in the packaging is a very big challenge to us. If we developed a packaging that can address cosmetics packaging without altering the quality."

**ICTs and Market Services.** All the BLs were very apprehensive about the potent role ICTs can play in marketing. In fact, most of the BLs were optimistic of investing more into the ICTs to enhance the access of export markets. BL3 had this to say, "Our ICTs are tailored towards the company identity, the phones, the emails, and the social media platforms; this creates comfort to the customers as they feel they are dealing with the company itself." And that "we have built a system on which we profile and register

the details of our farmers for ease of financial access, traceability of coffees, that is, from farm to the consumers.”

BL3 further explained that “to reach, communicate, inform, and educate targeted international markets about our products, we use our social media pages and certification schemes’ communication channels onto which potential buyers flock and get information about coffee.” BL2 explained that “for clarity and proper communication with export markets, we keep dedicated lines, channels, social media platforms, emails, and tel-contacts.”

**ICTs and Prospecting Markets.** All BLs amplified the potent role of ICTs in improving marketing services of their organizations. For example, BL2 decried the role of ICTs, to enhance doing business online, including soliciting for orders, identifying potential importers, potential distributors, and running other logistical processes. BL3 highlighted the role of ICTs in automation of various processes like documentation, generation and sharing (itra-communication), communication between parties involved in the exporting of coffees, making inquiries, responding to inquiries, and tracking export consignments.

BL3 further explained that “we also creatively reach out to buyers, most of them have websites at which we can adequately interact. So, they make inquiries, we send samples and inform them of our offer, and the transactions get initiated from there.” BL2 further explained that:

We need to strengthen the ICTs Department in our enterprise, and we should aim at developing and adapting an integrated system that enhances the interfaces of all

departments in an enterprise, such that one is able to access all critical information at their desks with just a click of a button. Such interfaces help in database building, capturing vital data, monitoring sales and production processes, storing digital documents (Cloud stores), etcetera. A need to have exclusive rights of a company's brand through property rights registration at the international level.

With the international property registration, enterprises will avoid issues of piracy or infringing on one's brand under the guise of lack of international recognition.

ICTs are such an important development and trend for enhancing internationalization; ICTs enable not only calibrating product dimensions but also connecting producers and buyers in export markets. Business leaders must incorporate and take advantages of ICTs as they develop global expansion strategies.

### ***Plant Location and Utilities Supplies***

Findings implied that the BLs had mixed feelings about their current plant locations. Whereas some of them were indifferent with their location others were concerned, as they considered and mentioned several short comings. For example, BL3 explained their location thus:

This being an industrial park, I would consider it an ideal location, especially from the technical side; for example, the national power supply body has an office here intended to ease and sort out power issues for industrialists in the park. But also, industrialists mobilize themselves into collective efforts to approach utility challenges like roads, power, etcetera. Trucks are available at the Internal Container Depot (ICD) because there are many deliveries in the park, so it is

easier to find an opportunity transport. In short, we are strategically located, and it is easy to get linkages to several relevant services. For the suppliers and deliverers of coffee, they don't have issues of access to here since our location is linked to all major roads entering the capital city.

BL1 explained that “our location is not a problem because we are fully networked, and we continue to create more networks from both the supply and demand sides.”

On the contrary, BL4 stated that “a tannery is not supposed to be located near the people. There must be a water source and efficient roads. Given the state of infrastructure in Uganda, to access roads, water, etcetera., you have to locate near the people.” BL5 lamented that “as a processor, I need some basic infrastructure in place, for our fruit business, there must be dependable roads, for the dehydration plant there must be constant power supply. All these are a little lacking.” And “the entire park has one bank. There are no restaurants around here, so, when I'm entertaining my guests, who may be potential buyers or suppliers, I have to move all the way.”

The above expositions highlighted the strategic differences between the demands of various players in various manufacturing sub-sectors. However, industrialist prefer the availability of a plethora of things; these may range from utilities, services, to spares within their locations. Developing a potent global expansion strategy, business leaders must provide for an advantageous location to benefit from potential externalities of other facilities.



### ***Export Readiness and Transactional Efficaciousness***

Gerschewski et al. (2020a) and Gkypali et al. (2021b) looked at the SME's export readiness as an offshoot of the business leader's specific virtues and a firm's characteristics. Combining these two aspects, through an entrepreneurial perspective and the firm's network advantages, prepares the firm for exporting. In the proceeding paragraphs, I presented the BLs' responses on how they were prepared to embark on export adventures of their products.

**Fulfilling Orders.** BL3 argued that their export product is seasonal, therefore, they only sign supply contracts based on coffee seasonality. With the mandatory regulation, management engages the concerned officials, in time, to secure timely approvals, so that they are able to dispatch the coffees to its destination in time. In addition, they have adopted a transaction practice where buyers take possession and title of their coffees ex-factory; that way, BL3 is able to fulfil orders promptly. BL2 explained that it would have been very difficult for them to engage the distribution responsibilities in export markets. Thus, they identified and engaged country local distributors, who take possession and title of the export products ex-factory. Since these people understand their markets better, they are able to service them promptly.

BL3 argued that they adequately address the availability of necessary working capital, so that once processing and value addition starts it does not get stuck because of lack of funds. BL1 explained that "when we get an order of say 22 tons of shea butter, we prepare and service it within a maximum two weeks because we have raw materials in stock. We only engage repackaging, checking standards for conformity, labeling,

standard weighting.” BL3 also explained that they have created links and business relationships with several carriers, and this gives them room for price negotiations while they hand over the coffees to the buyers, that is, free on carrier.

BL4 claimed that over time they have created transport links with several transporters, so when they get an order they contact their transporters, and containerize the shipping. They hand it over to the transporter who takes charge up to the product destination. Therefore, business leaders must build and formalize export related and marketing-related activities to strengthen their export readiness, for which they ought to provide for as they develop a systematic global strategy.

**Pricing Negotiations, Quoting, and Getting Paid.** BL3 explained that their bargaining advantage is embedded in the attributes of the coffee; after they have identified the attributes through cupping, the enterprise is in a strong position to ask for fair prices. Although the enterprise conducts B2B transactions, management feels that the coffee attributes sought by their buyers reflect what the final consumer wants. BL5 argued that they do not have enough flexibility in price negotiation because of the freight costs; almost 70percent of their revenues off sets freight costs leaving only 30 percent to cater for the rest of the components of pricing. BL4 explained that despite the numerous costs involved in procuring and producing wet-blue hides, they do not have price bargaining flexibility. Most of the time, prices in the tannery industry are dictated by the buyers. Wet blue is strictly a B2B arrangement, therefore, manufacturers act deductively from what the buyers have set.

BL2 explained their pricing advantage, which is based on the strength of export market currencies relative to the exporting country. The comparative economic imbalance makes their jellies look cheaper in the eyes of their export customers, and that gives them flexibility to even maximize profits in some markets. He also explained that jelly users in export markets have a high propensity to using alternative cosmetic products rather than the hydroquinone mixed ones.

BL2 expatiated that they have never experienced issues of non-payment; this is because of their payment terms they offer to their buyers abroad; buyer must pay upfront to the tune of 50 percent of the purchase price before their orders are processed. BL3 explained how changing global health conditions pushed them to change their payment terms; the incidence of COVID 19 pandemic resulted into losses, some of their buyers had not paid at incidence of the global economic lockdown, so their current buyers must deposit 50 percent before shipping their coffees. BL5 explained that in their export business the issue of payment causes them a lot of stress; SMEs are always tight on cash flows, so they demand a 50 percent upfront payment before they process a customer's order.

Atac (2005) argued that a business must develop the capability to negotiate, quote, and ably get paid for their product supply, especially in the B2B business. Findings from this study have revealed that most of the BLs face a plethora of bills like taxes, freight charges, insurance costs, in addition to the business running costs; however, leaders intuitively optimize their pricing by adapting strategies like ex-factory shipping, upfront payments, etcetera. I find their approaches appropriate, and should be strengthened,

because it ensures availability of working capital, which keeps the business fervently running. SME BLs, therefore, need to give this task a strategic focus when developing their global expansion strategies.

**Marketing Transactions for Getting Orders.** Atac (2005) explained that one of the responsibilities of a business leader is to develop the transaction cycle, so as to obtain, fulfil, and get paid for orders from potential customers. Many of the BLs that participated in the study did not demonstrate enthusiasm in developing this task; of course, they explained how they get their business orders from target export markets; many of which were referrals, host markets distributors' initiatives, buyer efforts to look for specific product sources, etcetera. However, business leaders ought to strongly focus on building this task, as it keeps the business running through obtaining incessant supply orders.

#### ***Participation in International Transactions***

Morais and Ferreira (2020b) and Priyono et al. (2020) explained that a firm will engage international transactions after attaining a certain level of productivity, innovation, and has built internal dynamic capabilities. The theorists reiterated that such a firm is likely to cover its incurred fixed and variable costs, including sunk costs related to the internationalization venture. However, BL3 and BL4 focused on commercialization of their products' comparative advantage features that they have in their respective industries; for example, BL3 had access to special coffee origin the market was craving for, while BL4 and BL1 had complied to critical certifications that markets hailed for organic shea butter and wet blue hides respectively.

BL2 explained that their export market presence elevated to commercialization after they had perpetuated and tailored their adverts to local language and sentiments. BL2 stated as thus “we need to understand that for every market they are the dos and don’ts, the culture of the given country market.” BL3 idealized their participation in export markets on their relevancy to the industry because their target customers are buying specialty coffees with an accompanying story. BL5 cherished their ability to tailor production to their customer needs and guideline; they constantly calibrate tailored products according to individual customer desires.

BL3 and BL2 flagged the role of creating and sustaining export market pattern-relationships; such relationship are mandatory for some countries while in others they are created out of convenience. BL3, BL4, and BL5 highlighted the role of consistently providing the unique selling position of their products to their target export markets. All BLs subscribed to the claim that export market participation dwelt more on their ability to consistently avail the desired product quantities.

BL5 claimed resilience of management to pursue their export ambitions, while BL1, BL2, BL3, and BL4 appreciated the number of years they have spent in export business as a driver of their continued participation in exports; they claimed that they have amerced a wealth of experience in handling foreign markets and moving products. Therefore, we learn from all these expositions how dynamic an export strategy can be; many exporters reign on internal push advantage factors while others thrive on aligning with external pull factors originating from the target market. A business leader need to be sensitive of their product, expertise, knowledge, and managerial competence advantages.

## **Theme 4: Enterprise's External Factor-based Strategies for Successful Export**

### **Venture**

Like the preceding theme, theme 4 focused on the critical analyses of the external factors to the enterprise, so I hereby present my findings for export buyers' related issues, export country impingements, and regional and country policy framework for enhancing exports. Morais and Ferreira (2020a), Roque et al. (2019), and several other firm internationalization theorists attributed global penetration to external pull factors.

### ***Our Buyers' Related Issues***

Leaders expressed several cases where some had been defrauded by buyers who masquerade on the internet; in some cases, fraud happened even after the enterprise has had a significantly long term business relationship with these so called buyers. Leaders have instituted a practice of sharing risks between the buyer and themselves; they demand a 50 percent deposit before processing any order. That way buyers and sellers are able to share risk in the short term until each one of them does their fair part of the business bargain.

In other cases, leaders showed concern over their failure to serve the markets with order specifications, which may be caused by negligence, miscommunications, and deliberate actions from some company employees. Leaders expressed the role and importance of seeking feedback from buyers; in case such things happened, they should get information and plan for reparations in subsequent order servicing. Leaders also commended some buyers whom they branded as courteous; this is because such buyers

appreciate the constraints of land lockedness, structural and logistical rigidities in some parts of the world, and human errors, so buyers agree to engage transactions ex-factory.

### ***Export Country Impingements***

Some leaders lamented the dirty games that their domestic competitors play in export markets; specific BLs claimed that, in most cases, they serve the same export markets as their domestic competitors, thus countering similar competitor game plans as in the domestic market. Other leaders expressed concern about the domestic certification processes; some of these bodies like Uganda National Bureau of Standards (UNBS) is understaffed, staff do not have customer care, there are so many products to certify, and it takes forever. The bureau has some unnecessary processes that do not add value other than wasting time.

Other leaders complained of the limited certificate active time before subsequent renewal of the license, which is, in most cases, one year. BL4 argued business leaders to identify and adapt industrial symbiosis; this is where a manufacturer diversifies into manufacturing another product that uses the former's by products as raw materials inputs. Symbiosism between products help to absorb shocks like the Covid 19 pandemic.

### ***Regional and Country Policy framework for Enhancing Exports***

Leaders expressed concerns about a number of domestic and regional policy frameworks that influence the way business should be conducted; at times, the government imposes policies when it wants to stimulate exports at the detriment of other sectors like environment. BL5 complained of excessive government bureaucracies and action promising rhetoric, yet they do not perform, thus “. . . takes a lot of pride in talking

about how they will expand to the next thirty business parks even before strengthening the first on.”

BL2 complained of lack of good spirits towards each other in the East African Community. He stated the following “we lack good spirits within the East Africa, we still see ourselves as Ugandans, as Kenyans, as Rwandese, as Congolese, as South Sudanese, not as East Africans.” BL2 and BL3 commended government’s efforts to boost exports through incentives like tax waivers for exporting companies, yet other BLs admired other countries’ business frameworks that supports their domestic producers better than Uganda does. BL2 suggested that “potential exporters need to know existing safeguards, the systems, assurances of payments and interventions available just in case, and procedural streamlines, surely exporting is as good as domestic market participation.”

#### **Theme 5: Global Expansion Strategies**

Theme five examined the potential global expansion strategies that emerged during the study; business leaders ought to focus their attention on these strategies. BL5 explained that, as African countries, they can trade amongst themselves instead of rushing to other continents, yet these products are also demanded on the African continent markets. Looking for opportunities, in Africa, offers several advantages like proximity, similarity in purchasing and demand cultures, and limited importing hurdles. Business leaders, therefore, should begin to prospect markets from the continent by refocusing resource endowment differentials.

Business leaders should exploit the advantages that come with regionalism; regional bodies like SADDC, COMESA, AfCFTA, IGAD, EAC, ECOWAS, etcetera.,



present block dynamics if penetrated can offer sizeable markets. BL2 emphasized the role of tailored communication in export market penetration and sustainability; leaders must adapt a learning attitude, and engage in understanding the dos and don'ts for every market. That way, leaders will know existing safeguards, the systems, assurances of payments and interventions available just in case, and procedural streamlines.

Leaders should organize their businesses in clusters to ease or quicken export ventures, for instance, if its jelly let there be a cluster for all producers of such products. Clusters will then penetrate international markets as blocs of producers instead of the individualistic tendencies common with Ugandan manufactures/exporters.

### **Theme 6: Serendipitous Findings**

Balzano (2022) and Smets (2022) looked at serendipitous as an unintended discovery or to create opportunities for those who are advancing a given concept, so that they identify unintended advantages or perspectives that can bridge up their achievements. To them serendipity comes with enhancers of the internationalization processes of the firm, unexpected performance in the export market, and potential acquisition of strategic assets like networks, critical value chains, etcetera. Findings from this study revealed such serendipitous conditions; examination and harnessing of which could create observable conditions for the enterprises. In the proceeding paragraphs, I have explained those serendipitous conditions that BLs realized during their courses of duties.

### ***Internal Challenges***

BL3 explained that identifying and succeeding in penetrating roasted coffee markets is a nightmare because most cafes, in coffee consuming countries, do practice

roasting themselves, and therefore, one would be encroaching onto their sacred profit node. BL4 demonstrated how cultural beliefs affected the quality of hides and skins they get; flockists do not sell young calves; they count them as a preserve of treasure, yet skins from such animals offer the best wet blue leather because of rarely have signs of stress.

BL5 claimed that they are operating in an environment where there are no solutions to potential challenges like spare parts, machine break down, etcetera; there is a scarcity of fully skilled, knowledgeable technicians, no engineers, and inadequate infrastructure, yet they have to compete on a global stage. BL1 explained that they are lacking proper or quality packing materials, yet shea butter is very sensitive to temperatures, and destination markets in Europe have issues with plastics. Its ironical to find a business leader without any documented business or strategic plan, yet he is running a prosperous enterprise. The cause of such luck can only be attributable to serendipitous circumstances.

BLs also identified that entrepreneurs have a deep seated phobia to present their products for certification; they fear exposing what they do because of their best-known reasons including the potential failure to measure to standards that they may not know at the time of presentation. Fear, like luck, can be serendipitous, as it can be difficult to anticipate and provide for in company strategy. BL2 decried the ignorance of entrepreneurs; Entrepreneurs ought to learn the exporting procedures, for sure, BLs exhibited a lot of ignorance about the export requirements, the dos and don'ts, etcetera for a successful exporting venture. Leaders should be well versed with the procedures

involved in selling to international markets like how to get paid, the mandatory taxes, etcetera.

### ***External Challenges***

All BLs decried the extent of risks they have to deal with, regularly; they mentioned the presence of internet-based fraudsters who masquerade as potential buyers; a leader may be convinced that such people are potential legitimate buyers to conduct business with, and may be tempted to supply their products. Once the fraudster receives the products they vanish, cut off all contacts they would have been using, and they pull down the website. BLs also mentioned the risk of interfacing with fear from export markets. Potential buyers fear to risk their monies if they paid before receiving the supply, yet entrepreneurs also fear to supply before getting paid. Failure to agree on payment terms escalates into loss of business.

BLs explained the trend of competition in both domestic and international markets. BL2 explained that “we enter these markets blindly, without understanding the competitors’ approaches to the marketing mix elements (4Ps) of their plans. In fact, we lack market intelligence and astute analysis of our SWOTs vis-a-vis the competitors.” BL3 lamented that “roasted coffee from Uganda has a small market because export markets’ buyers do practice roasting and blending, that is, mixing, let's say, Ugandan coffee with other sources’ coffees to customize their brands; they also do not trust our processes.”

Big economies, especially those hosting our exports, do impose non-tariff barriers in the name of protecting their ultimate consumers, and lack of trust in our processes. The

standards body issues a one year permit of exporting; this time spell is so short for meaningful business, and the export license is cumbersome to renew, yet importers just check on the UNBS's website for validity of these permits. In case potential buyers establish the permit status as expired they will never allow those products into their frontiers. Also, Uganda being landlocked is a huge challenge because exporters interface with issues of transport, freight, import duties from export market destinations. The flying traffic out of Uganda is much smaller than, let's say, Kenya, so the freight costs will always be higher to the detriment of exporters' pricing flexibility and overall earnings.

### ***Overcoming Challenges***

All the BLs wished that the Ugandan government upscaled the national carrier for both volume and routes; exporters would take advantage of those benefits. The government should bring to fruition its plan of standard gauge railway; this will provide a very cheap alternative transport means of SMEs' export products carriage.

### **Application to Professional Practice**

In this study, the goal was to explore the global expansion strategies that SME managers use for internationalization. As pointed out earlier on, few studies had been conducted in relation to developing of business functions' tasks as a potent push factor to internationalization. The findings, therefore, contribute to the extant literature about the field of firm internationalization.

The findings of this study illuminated the need to develop enterprise business functions' tasks as a potent tool of not only improving business competitiveness and

performance in export markets but also contributing to global expansion strategies.

Efficient business functions' tasks are a key enterprise push factors that can enhance internationalization; the assertion aligns well with several internationalization theorists who advanced the role of push factors to global expansion (Gkypali et al., 2021; Vitrenko et al., 2020).

Findings presented under theme three of study, which received 665 coded references from all BLs, emphasized the role and critical need for business leaders to pay particular attention to business functions' tasks for internationalization. The emphasis is in line with Atac's (2005) attention to business functions' tasks as a potent tool for enterprise competitiveness and a platform to internationalization. The findings under theme three also emphasized managerial efficaciousness in developing and implementing optimal operation strategy, operation strategy crafting processes, identifying the critical production and marketing function's tasks, eUtilisation, plant location and utilities supplies, export readiness and transactional efficaciousness, and participation in international transactions.

SME's business leaders, therefore, should appreciate the managerial role of developing their businesses' operational strategies, through identifying target export markets' needs, design and developing a product with features that address the markets' needs. Leaders then, should plan, acquire, allocate, and implement the operation strategy through identifying and developing the critical business functions' tasks. Leaders should then focus on developing the transactional competencies, with which they service export markets while getting paid promptly.

Business leaders should be vigilant of serendipitous occurrences, which may either present themselves as opportunities to enhance the business or as subtle unexpected external and internal challenges to the enterprise's competitiveness. From the findings presented in theme 4, business leaders should emphasize clustering and groupings as they embark on the internationalization venture. Findings emphasized the role of approaching export trade as a group; cemented by product homogeneity that addresses the relatively homogenous needs in export markets.

### **Implications for Social Change**

The results of this study, if applied efficaciously, will benefit MVA SMEs in sub-Saharan Africa to refocus their sustainable value creation efforts toward building the requisite business functions' tasks critical to their growth and expansion into global markets (Senge et al., 2010). Global expansion and sustainable performance will drive SSA SMEs to experience three major outcomes: First, the economic activities will more than quadruple as more businesses exploit lucrative global markets. Second, there will be optimal resource allocation engineered by distortion-free market forces. Third, because SMEs subtly contribute to economies' micro and macro growth (Prieto-Sandoval et al., 2019), all players, including SMEs from countries like Uganda, will benefit from economic inclusion.

Improving SSA SME performance through internationalization will expand their share from the MVA's global income stream category, which is currently at over \$18.9 trillion (UNCTAD, 2020; WTO, 2021); consequently, this will grossly contribute to employment, poverty alleviation, expand financial inclusion, and expand host economies'

gross domestic product (GDPs) (Gherghina et al., 2020). It should be noted that SMEs world over, are one of the biggest employers (Abisuga-Oyekunle et al., 2020; Ibarra et al., 2020); the more the people get employed the bigger the financial inclusion, and the deeper poverty get alleviated.

### **Recommendations for Action**

In this study, the goal was to explore the global expansion strategies of SMEs; findings from the study can be instrumental for SME leaders that are planning, struggling, or have embarked on exploiting external markets. The findings provide a clue to SME leaders that have already succeeded in penetrating into export markets, but facing performance sustainability challenges, as to how they could boost their performance, sustainability, build competitive monopoly, and expand their international presence; Chaldun et al. (2020) and Gerschewski et al. (2020) advised how internationally struggling players would boost their performance, sustainability and expansion. Leaders will learn from several thematic areas of the findings, as to how to optimally focus their attention for projectible and achievable results.

Based on the findings, recommendations included that SME leaders should appreciate their role in building a competitive and sustainable enterprise for international markets. Theme three categorically and clearly revealed critical intra-enterprise factors that business leaders have to focus attention to strongly launch into internationalization. Findings have diversely emphasized the managerial responsibilities in building a successful export venture; theme three has highlighted the roles of planning, acquisition, allocation, and execution in developing the key intra-enterprise push factors.

Theme four findings highlighted those external factors to the aspiring enterprise that shape how it can progress and succeed in its export venture endeavors; specifically, findings pointed to exporting country impingements, country and regional policy frameworks for enhancing exports, and export buyers' related factors, for which, an export-intending SME must examine and provide for in its internationalizing strategy. Therefore, recommendations include that all export-intending business leaders do focus on, provide for, and incorporate those thematic factors into their internationalization planning, and carefully devise and develop effical processes and procedures to implement the findings to their critical details for sustainable results.

#### **Who Needs to Pay Attention to the Results**

Given the wide scoped findings that have included both external and internal environments of the firm, I implore a number of actors to pay special attention to these findings for spectacular SME internationalization results. First of all, managers of SMEs should pay special attention to the issues of managerial efficaciousness in building the internationalization strategy from within the enterprise's environment. Political and trade related leaders from export countries must study these findings, and play their part in providing an enabling policy framework for entrepreneurs to soften, quicken, and streamline the internationalization processes. While participating in international markets is quite lucrative, SME leaders must devise the means of aligning, complying, and providing for total certifications of export market entry requirements; export markets have a duty of care for their citizens; they can only achieve this through setting and monitoring for standards compliance.



### **Disseminating the Results**

Recommendations include that dissemination of the results from this study be done in two ways, that is, through publishing this work piece, and it is a responsibility of the Walden University, which by way of patent, partially owns the outputs. Publishing this work will give a chance to business leaders across the global to access, read, internalize, and compare with their routines for a proper benchmark and gaps' filling. For SMEs in Uganda, especially those that have participated in the study, should with permission from Walden University, have a chance to access a summary of the results.

### **Recommendations for Further Research**

In this section, recommendations include stanning actions and approaches to conducting related future research, and I emphasized the role of building effective rapport with the participants. Multiple-case participants, especially business leaders, are such a busy group who may fail, unintentionally, to give a researcher the optimal support, time, and concentration that researchers would aspire for. However, realizations include that leaders can adjust to demands of the occasion depending on how a researcher approaches them, the nature of formality introduced to them, and how they evaluate their contributions to the study. Optimal participation leads to openness and honest discussions; such virtues make the research findings meritorious, and can heavily enhance trustworthiness, generalizability, and smooth replicability.

For future related research, recommendations include further probe of the managerial competences in building the requisite enterprise capabilities for internationalization; this is a logical appendant of the reality that a business does not have

business problems perse but managerial problems that lead to failure of identifying, planning, and executing a solution(s) to that anomaly. It should be noted that managerial laxity, ignorance, incompetence, and inertia are the common causes of failing internationalization ventures, and failure can happen at inception, during progress, and at sustainability phases of internationalization. Therefore, further research into circumstances that lead the above managerial inadequacies would be handy in enhancing SME internationalization across sub-Saharan Africa.

Strong recommendations include an expanded study of internet based fraud, which I serendipitously found as an encumbrance to international business success. Internet is such a trendy and potent tool in internationalization because it is used in various spheres of cross border transactions like payments, moving and tracking goods, identifying markets, etcetera; however, many productionists have fallen prey of internet fraud, which effectively dismantle their business progress in international markets.

### **Reflections**

To enable a successful acquisition of thick and rich data about the internationalization phenomenon, I took on the role of the data collection instrument, as explained by Henderson (2018). A researcher, in a qualitative study, assumes a medium of discovery, collector, interpretation, analysis, and a reporter (Aguinis & Solarino, 2019b; Dodgson, 2019; Roulston, 2019). I conducted semistructured interviews with MVA SME leaders scattered across the country, and I reviewed relevant company documents from SMEs that allowed me access. I also made observations of SMEs' production line layouts and material flow through the transformation process. After

conducting the interviews, I organized the data using NVivo software; with its sophistication, I was able to identify 227 codes, which, after further iterative analysis, reduced to 188 codes.

Choices included the ability to study leaders' global expansion strategies after attending one of the annual exporters' performance award winning ceremonies. In the occasion, the authorities lamented how manufactures were not so keen to venturing into international markets, and those who do so expressed stress, failure, and a plethora of other potent challenges that impinge on to the undertaking. It's evident that SMEs are one of the biggest employers in the country, and significantly contribute to the overall GDP and other macro factors of the country. There was not enough literature about the detailed push factors of the enterprises other than a claim on availability of resources, which would push a company into internationalization. A combination of all the above pushed my intuitive mind to further probe into the area of business internationalization, hence forth embarking on this study.

I sought my contribution by contextually studying in detail, five SMEs as potent cases to reveal what entrepreneurs perceive of developing internal capabilities to support internationalization. Whereas, I had mixed feelings about the potential findings, SME leaders overwhelmingly amazed me; where those that appeared to perform well in their export markets had a strong focus on business functions (production and marketing). Managers appeared to priorities developing certain tasks over others, and the managers' tasks' choice was based on their unique perception and appreciation of business. I must commend all the business leaders that I approached; they were receptive and willing to

contribute their knowledge and experience. Surely, the journey to completing this doctoral study has been procedural and challenging, reminiscent of earlier life experiences that I had engaged which required zeal, drive, and resolute to achieving fruition. However, I feel proud and a sense of accomplishments that I am writing my last paragraphs, embedded with such vital contributions that are capable of creating positive social and economic changes.

### **Conclusion**

I need not over emphasize the role of SMEs, in countries like Uganda, towards the achievement of a plethora of macroeconomic targets like employment, financial inclusion, and GDP expansion. Internationalizing SMEs comes with yet another package of benefits like increasing a country's share from the category of MVA global income streams. However, the popularity and zeal to undertake such ventures is significantly low, as SME leaders feel drawn back by several indicatives, so SMEs do not internationalize in big numbers and fast enough to create the desired and projectable impacts.

The impasse is created by business leaders' lack of efficacious internationalization and global expansion strategies, so my study's purpose was to explore the potent global expansion strategies which exporting SMEs have used to penetrate export markets. I hope that the findings of the study assist SSA MVA SMEs to craft and implement successful and efficacious global expansion strategies. Internationalization is vital for the contemporary global trends where the population is increasing, the purchase behaviors of potential customers is changing, and are shaped by several actors. More than ever before, new resources are being identified, developed, and exploited to serve a diversity of needs.

Both the country and enterprise authorities should upscale their perception of internationalization, with such vigor, to create a critical mass of enterprises that directly benefit from the numerous features of internationalization. In short, SME leaders should assume their role of projecting, implementing, and sustaining international market presence.

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## Appendix A: Interview Guide

**Walden University**  
**DBA (International Business) Doctoral Study**

**SME Internationalization; Interview guide for a multi-case study**

**A. Business Definition:**

*(Explaining what the enterprise is offering or producing or what actually the buyer is buying, and who the buyers or their needs are)*

*Guide on Enterprise Competitiveness, ITC, Geneva 2003*

*Atac, O. (2005). Business Management Systems. Geneva, Switzerland: UNCTAD-WTO-ITC.*

- 1. What does your enterprise produce or sell to customers?**
- 2. Who are your customers?**
- 3. Which geographical locations are they?**
- 4. What are their major unmet needs they are trying to address or solve by buying and consuming your products?**

***A1. Product***

**A1 a. Are your products standardized?**

**b. Do you have a constant demand of your product or erratic one?**

**c. Which areas of your entire product offer to your current international markets are innovative?**

*(Innovation in the generic characteristics or those that relate to the need, innovation in the physical characteristics or those that relate to the physical properties of the product like the shape, size, package, etc., innovation in the extended characteristics of the product like sales services, etc., and innovations in product conversion processes, etc.)*

**B. Business Functions' Objectives****Marketing:**

*(The role of marketing function is to find and keep markets)*

**5. What are your major marketing objectives?**

*(As your enterprise approaches and consequently serves the markets, what do you want to realize in there?)*

**Production:**

*(Production capabilities must be developed in such a way to achieve the marketing objective identified above)*

**6. What are your production objectives then given the above identified marketing objectives?****C. Operational strategy guide;**

*(The operations strategy shows the roadmap on how the manager intends to allocate resources and build capabilities/prioritize tasks in order to produce what he suggested in the business definition above, his offer to the markets to address the unmet needs)*

***C1. Quantity Capability (Production)***

7. What are the specifications and quantities of your product that will best serve the targeted market segments' expectations?
8. In designing, laying, and installing your current production plant, what did you provide for or have in mind that influenced that decision?
9. Were there alternative layout plans from which you chose the current one?
10. Why did you choose this particular one?
11. Which phase of material handling on site do you consider most troubling and expensive?
12. What are the major work flow problems do you encounter with the current installation?
13. What mechanism have you put in place to establish the cost contribution of each sub-process towards the overall cost of production?

**(Engineering Production Processes)**

14. How do you handle work in your production processes?

*(Job Method where a group of workers handles and complete the process from start to end;*

*Batch method where work of the tasks is divided into sub processes which run concurrently and must be completed for the entire batch before it passes to the next operation;*

*Flow Method where the processes of conversion are continuous and progressive;*

*Group method where it capitalizes on the advantages of batch and flow methods, here similar processes are identified and formed into families while their required resources are formed into groups or cells)*

15. Why did you chose that particular method (s)?

**(Locating and Evaluating Plant Site)**

16. How do you assess the suitability of the current location of this factory in light of access to relevant supplies, utilities, and markets?

*(proximity to markets, integration with other parts of the organization, availability of resources, availability of services, availability of transport, availability of inputs, availability of utilities, suitability of land and climate, local regulations, room for expansion, safety requirements, site cost, political, cultural and economic situation, special grants, taxes and import-export barriers).*

17. What are the “must have” criteria for your industry if one is to construct a factory?

**C2. Quality Capability**

**(Developing Quality Standards)**

*(Determining the product attributes that signal to the customers' expectations and needs, which should then be translated into product attributes like; durability,*

*availability, functioning, etc., and then determine what the enterprise should do to ensure that those attributes are constituted into the product)*

18. What do you consider when designing or adopting your product quality standards?
19. How do you check for conformity to the standards agreed on or adapted for the production processes?
20. What are the major benefits that do accrue to your enterprise because of those quality standards?

#### ***(Designing Product Service Departments)***

21. Do you have a fully-fledged function that offers before and after sales services intended to identify and offer warranty servicing, repair, recalls, updates, upgrades, support in order to improve, maintain, and ensure quality production?

#### **C3. Time Capability**

#### ***(Determining Inventory Requirements)***

*(To be able to serve markets with the required products an enterprise must have a system to determine and maintain the optimum quantities of material required, considering the existing conditions, such as production methods, product design, raw material specification, sales policies, and plant layout; i.e. semi-finished products, raw materials, components and parts used in the production process, Maintenance, repair and operating {MRO} inventories etc.)*

22. How do you determine the inventory requirements for each sub-process and how does that impact on the timely availability of your products to the target markets?
23. How do you replenish those inventories that require procurement function?  
*(Just-in-Time Systems, Fixed order interval system, Fixed order quantities system, etc.)*
24. How do you organize inventory storage and how does storage locations and inventory movement impact on the efficiency of production processes?

#### **C4. Cost Capability**

*(Strategies and competences of the enterprise to build its production capabilities to be able to produce at acceptable and competitive costs)*

#### ***(Balancing Production or Line Systems)***

*(This strategy pertains to arranging manufacturing processes in the form of a continuous flow, so that a part or material moves continuously at a specified rate through the necessary operations towards its completion with all operations performed simultaneously at a balanced time interval)*

25. How do you balance work between various work stations whose contributions lead to a complete manufacture of a product?

*(Service time or time required to complete work, cycle time or time interval between completions of two successive items)*

**26. How do you maintain the physical assets of your enterprise?**

*(Inspection, Service, Preventive maintenance, Repair, Replacement, etc.)*

**27. What criteria do you apply to break down the work on an order to identify the work time needed to complete a product?**

*(Value-adding work, Non-value adding work, and Waste work; this task identifies those activities a customer is willing to pay for as they positively contribute to the creation of the product)*

**28. How often do you introduce or adapt cost reduction programs and processes?**

*(Improved methods, reduction of waste, and more efficient use of all available resources, etc.)*

**C5. Communication Capability (Marketing)**

**(Preparing Sales Literature)**

*(Sales literature refers to all the written material that enables an enterprise to inform customers and potential buyers about the existence of a product or service and its characteristics. It also helps the person to use the product. Sales literature is used to support the marketing strategy of an enterprise and back its communication capabilities).*

**29. How do you adequately help your target customers to simplify their buying process?**

*(Explain the benefits, provide instructions on how to use a product, price lists, Catalogues, Technical Papers, brochures, etc.)*

**(Programming Advertising)**

*(Consists in determining the schedules, themes, layout, text and media of advertising. It includes determining the relative worth of different media for reaching specific groups in targeted markets or segments. It's intended to develop a standard procedure for the enterprise to decide how much and where to spend money on advertising)*

**30. What do you consider when designing an advertising strategy for your merchandise?**

*(The financial out turn and plan, marketing objectives, marketing strategy, analysis of the situation, research, etc.)*

**(Programming Promotions)**

*(It includes determining the relative worth of different media for contacting specific groups in targeted markets or segments, in the process the enterprise must try to promote its products more effectively and efficiently than its competitors)*

**31. How often does your enterprise engage in promotions campaigns?**

**32. When do you use any of the major promotional types like those mentioned below here?**

*(contests, sweepstakes, coupons (price-off coupons, retailer coupons, manufacturer's coupons,), giveaways, free consultation, loyalty schemes, giveaways and premiums in sales meetings (mail-in premiums, self-liquidating premiums, direct premiums), refunds and rebates, bonus packs, price-offs, consumer deals, sampling, trials and allowances)*



*(advertising allowances, merchandise allowances, buy-back allowances, count and recount allowances, buying allowances and trade allowances).*

**C6. Distribution Capability (Marketing)**

*(Distribution lies at the heart of sales and it is always necessary depending on the definition and strategy of each business, as well as on the segmentation of the business' products or services).*

***(Setting Up the Channels of Distribution)***

*(Consists in selecting and developing the most effective and efficient network of intermediaries for flow of goods, services, information and money)*

**33. How do you serve your export markets with your merchandise?**

*(The enterprise should distribute its efforts rationally between channels {push} and final consumers {pull})*

**34. How do you maintain your distributor network and intermediaries in the domestic market and abroad?**

*(Relationships with channel members should be based on mutual understanding and profitability. No party should feel hostage of the other party, e.g. Subsidiary, Branch, Licensing, Franchises, Agents, Distributors, etc.)*

**C7. Marketing Transactions for getting orders (Marketing - Wing)**

*(An Enterprise must build capabilities to acquire orders from potential customers, through making its self-available to address queries and probes, reachable, and capable of flexibly register amicable terms of their offers to the targeted markets)*

***(Prompting and Responding to Sales Enquiries)***

*(It involves building procedures to answer enquiries and initiate contact with prospective buyers)*

**35. How do you ensure that potential customers' business inquiries are effectively handled?**

*(It involves reaching targeted customers through; trade fairs and exhibitions, buyers-sellers meetings, promotional Web pages, personal sales visits, direct sales literature, trade missions, press releases in the trade press, sales advertisements in newspapers are some forms, customer targeted ICTs, web pages, email, etc. Managers must make sure all the necessary systems and procedures are in place to: Plan, Execute, Control like putting checkpoints and procedures to know when things are done, and to evaluate)*

***(Preparing Specs & negotiating)***

*(It involves making sure that the products to be sold are clearly specified and that their sale is negotiated in accordance with the enterprise's policies and procedures. It enables all parties to have a clear understanding of the terms, and allows the enterprise to secure favorable terms)*

**36. How do you approach the negotiations and specifying product physical characteristics that serve to define the product with the potential customers?**

*(Preparing detailed specifications helps to avoid conflicts between the enterprise and its buyers concerning ongoing business to avoid prospective disagreements and possible losses for both parties, but also being able identify the real stakeholders and decision-*

makers during negotiations helps to ensure that all decision-makers understand the negotiated terms)

#### **(Pricing and Quoting)**

*(It involves determining the final or tentative selling price of goods or services and preparing quotations, standard procedures for pricing and quoting. There should be trained personnel responsible for pricing and quoting and standard procedures for pricing and quoting)*

### **37. What other factors, apart from costs of manufacturing and delivering, do you consider when setting prices for your international markets?**

*(Cost of production, the cost of distribution and the cost of marketing, costs associated with the different payment mechanisms and schemes, marketing conditions, consideration the buyers' business, supply and demand, the role of competitors and other aspects such as profit margins)*

*Other could be Market penetration, Price differentiation, Market segmentation, Capital recovery period, Promotional prices, Pricing based on rates of return, Pricing based on consumer's perceived value, Pricing based on competitors)*

### **C8. Production Transactions for fulfilling orders (Production-Wing)**

*(Once an order has been received in an enterprise, efficient efforts must be engaged to fulfil it observing the quality, quantity, time, and cost expectations of the targeted market better than competitors)*

#### **(Estimating Production Costs)**

*(This task involves estimating manufacturing costs in terms of projected manufacturing schedules, and standard costs)*

### **38. What do you consider to be your relevant costs of production?**

*(Product costs may include; domestic transport and export formalities, international transport and insurance, customs and distribution costs in the export market, non-production overheads like marketing, distribution and administration, packing, labelling and marking costs, loading and transportation costs, documentation charges, finance, insurance and duty cost).*

### **39. How do you derive at, compile, and store production related costs, especially variable and fixed costs of production?**

*(The enterprise must have a standard costing scheme to estimate production costs)*

#### **(Dispatching Work)**

*(It involves setting into motion production activities with a job order authorizing operations, and material and tool movement orders from stores to processing departments or from process to process for a given order)*

### **40. How do you determine the specific resources to complete a specific order?**

*(Requires information; it basically requires filling out forms as part of the systems and procedures, it requires using software support equipped with automated functionalities and electronic job order forms that integrates all production activities relevant to a given order)*

#### **(Scheduling Work and Routing)**

*(It involves prescribing when and where each operation necessary for the manufacture of a part or product is to be performed for a given order, it specifies the movement of the part of product through the required manufacturing processes or operations)*

**41. What do you consider as you plan production or work loading for a given order?**

*(A manager must have a shop floor schedule to assign the job to each production process or work center, which minimizes use of overtime, thus, optimizing valuable machine and labor time, while avoiding unbalanced workloads, delays and increased scrap rates, a process called loading. Using Gantt charts can help to evaluate how much load is placed on any given production process during the course of a specified time period, while demonstrating the cumulative days or hours, the total estimated work load that the jobs require at all work centers)*

***(Fulfilling Freight Operations)***

*(It involves arranging for and facilitating the physical movement of goods from the enterprise to its customers to achieve distribution objectives)*

**42. How do you ensure timely delivery of your merchandise or orders to their respective customers' preferred destination, domestic and abroad, in a timely outfit?**

*(Transport arrangements, package, and appropriate marking of the goods, export documents required, risks involved, legal requirements, such as customs clearance and compliance with the laws of the importing country, terms of sales, inspection, insurance, etc. the enterprise must have qualified personnel, or procure freight and forwarding companies, who know everything about freight documentation)*

***D1. Competitive Strategy***

*(For any enterprise to access and serve international markets, management must have ample knowledge of existing and potential competitors in the targeted international market, it must know the operational strategies of those that offer similar offer, etc.)*

***(Knowledge of competitors)***

**43. Who are your close competitors in the market segment you are serving?**

**44. What are the strategic difference between their product offer and yours?**

**45. How do you compare your promotional budget and theirs?**

***(Market segmentation)***

**46. What are the customer needs you are addressing with your product offer?**

**47. How do your customers in international markets buy your products in terms of volumes, timing, and convenience?**

***(Positioning)***

*(For an enterprise to be competitive in any market segment it must synchronize its product dimensions (Quantity, Quality, Time, and Costs to the market's consumption dimensions of the need, expected benefits, purchasing habits, and purchasing occasions)*

48. How do you compare your product characteristics to those of your competitors' offers in your target segment?
49. What is the general appreciation of your existing consumers about your product offer vis a vis their needs?
50. What drives your product innovations efforts?

***(ePotential)***

*(Management should be able to identify where it can apply ICTs to enhance its competitiveness and dominate its market)*

51. How can you use ICTs to enhance production processes?
52. How can you use ICTs to improve your product market access?
53. How can you use ICTs to improve the product dimensions of your product offer?

***(eUtilization)***

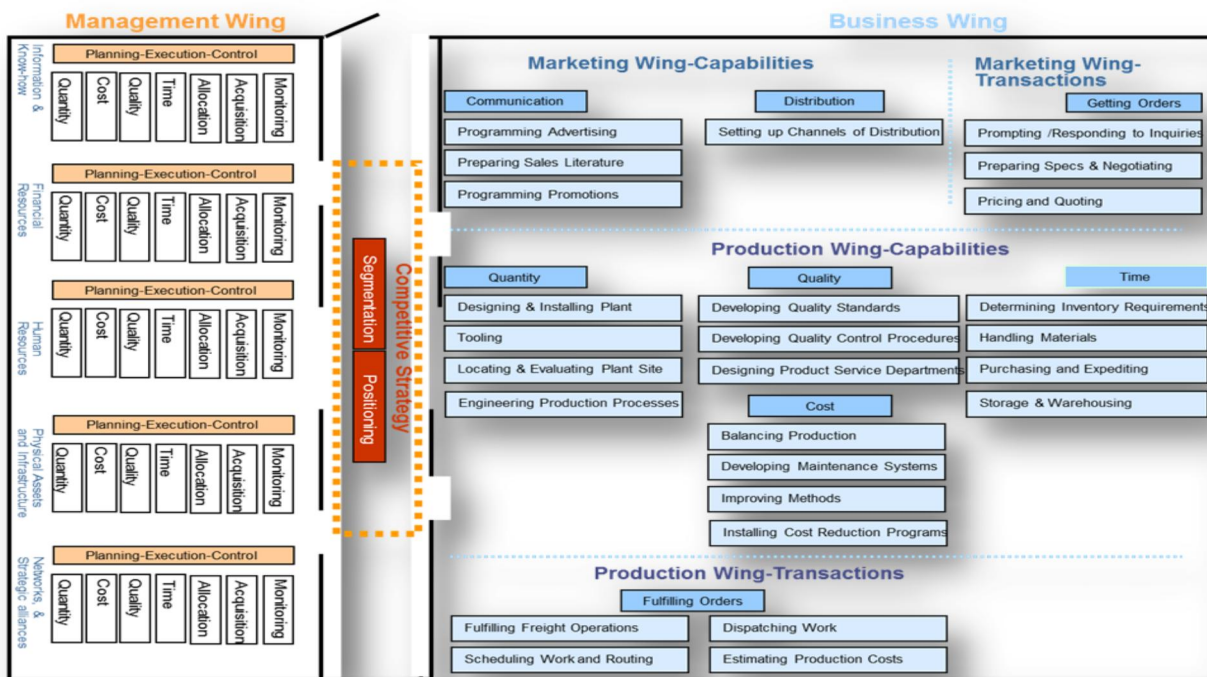
*(Management should be developing e-trade utilization and other ICTs competences to enhance its competitiveness and dominate its market)*

54. Where do you apply ICTs in your production processes?
55. Where do you use ICTs to access and serve your target markets?
56. Where do you use ICTs to improve your product dimensions?

***International markets venture and knowledge***

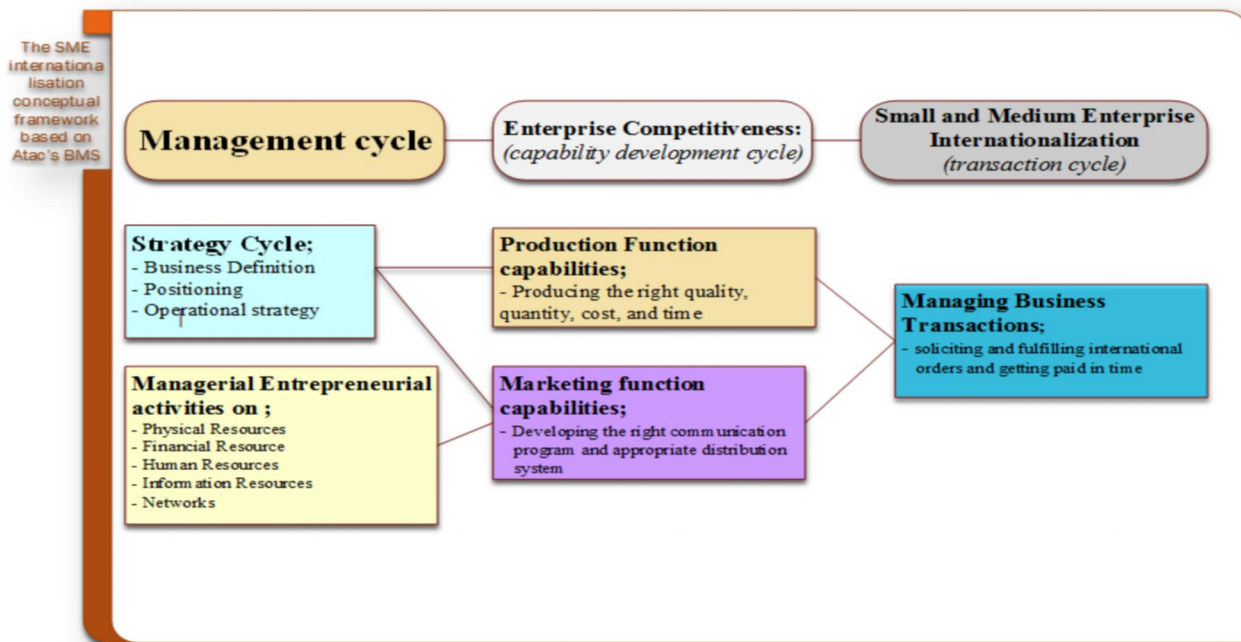
57. How long have you participated in international markets?
58. What triggered that decision to venture into international markets?
59. How often do you get useful information about potential international market destinations of your products?
60. What mechanism do you have in place, responsible for collecting international markets information?
61. Who collects that information?
- 62.

Appendix B: Showing the Business Management Systems Theory



Source; Adapted from “The business management system, Guide on Enterprise competitiveness”, Management competence Program, International Trade Center (UNCTAD/WTO)

Appendix C: Showing the Conceptual Frame of the Study Based on The BMS Theory



## Appendix D: The Abridged Data Collection Protocols for the Various Data Collection

## Methods

SN	Protocol type	Questions
A	Interviews Develop sub-questions and their respective questions (Castillo-Montoya, 2016; Dawson & Bob, 2016; Masango & Marinova, 2014)	<ol style="list-style-type: none"> <li>1. What do you consider when planning to build your production capabilities?               <ol style="list-style-type: none"> <li>1.1 How do you define quality production?</li> <li>1.2 What are the key aspects do you consider while planning for adequate volumes?</li> </ol> </li> <li>2. What do you consider when planning to build your marketing capabilities?               <ol style="list-style-type: none"> <li>2.1 How many resources do you allocate to communication about your products in their respective markets?</li> <li>2.2 What do you consider when choosing your distributors?</li> </ol> </li> </ol>
B	Observational Observational protocols or study protocols need to be submitted to IRBs for approval and these must have triggers of interest and the method of recording these instances (Medicine & Medicine, 2014; Renninger & Bachrach, 2015)	<ol style="list-style-type: none"> <li>3. I have seen this technology, what does it do?               <ol style="list-style-type: none"> <li>3.1 How efficient is it?</li> <li>3.2 Which technology do your competitors use?</li> </ol> </li> </ol>
C	Documentation protocols A need to establish the context of a particular document and the purpose of the author (Brower et al., 2019)	<ol style="list-style-type: none"> <li>4. Who authored the document?</li> <li>5. For what purpose?</li> <li>6. When was the document written?</li> </ol>

*Note:* These condensed survey protocols for the different data collection methods that I intend to use in data collection have been developed in reference to a number of authors as indicated under the various methods in the table above. SN refers to serial number

## Appendix E: The Attendant Thematic Framework of the Study

**Table***The Attendant Thematic Framework of the Study*

Theme	Major	Minor	Serendipitous	Files	References	Comments
1	Enterprise Identification	Our enterprise, who are we, what we do, etc.,		5	16	The theme had 6 files and 36 references overall.
		Obtaining the first export order		4	5	
			Export market destinations for our products	5	15	
2	Understanding our Product	Why our buyers buy our products		5	15	The theme had 7 files and 49 references overall.
		Who are our customers in the export markets		2	3	
		Critical practices in our export product's sector		2	2	
		Unique product specification buyers are looking for		6	23	
		Our export business and products		3	6	
3	Enterprise external related factors for export venture success	Regional and Country Policy framework for enhancing exports		4	21	The theme had 7 files and 40 references overall.
		Export country impingements		4	12	
		Our buyers' related issues		2	4	
		Risks and uncertainties from buyers and location communities	Plant citizenship in the community where it is located	1	1	
4	Intra-Enterprise	Managerial efficaciousness	Economic benefits of	7	116	The theme had 7 files



Theme	Major	Minor	Serendipitous	Files	References	Comments
	Factors for export participation		selling locally			and 659 references overall.
		Participation in international transactions	Ignorance about the exporting venture requirements	7	58	
		Production function's tasks		7	261	
		Marketing function's tasks	Helping our export market buyers simplify their cross-border transactions	7	87	
		eUtilisation		5	31	
		Export Readiness and Transactional efficaciousness		7	84	
		Plant Location and Utilities supplies		5	17	
5	Global Expansion Strategies	Accessing lucrative export market alternatives		2	3	The theme had 5 files and 21 references overall.
		Enhancing export trade		4	14	
		Doing more to improve our export ventures.		1	4	