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Strategies for Information Technology Small Business Owners to Sustain Beyond the First 5 Years

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Walden University

College of Management and Technology

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Edward Alan Rodarte

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Walden University
2022

Abstract

Strategies for Information Technology Small Business Owners to Sustain Beyond the
First 5 Years

by

Edward Alan Rodarte

MBA, The University of the Incarnate Word, 2012

BBA, Texas State University, 2007

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

Walden University

August 2022

Abstract

Small businesses are the foundation of an economy and spawn innovation, but small business owners fail at an alarming rate because they lack strategies to sustain business operations. Since 50% of small businesses fail within the first 5 years, small business sustainability research is critical to support small business owners. Grounded in entrepreneurial theory, the purpose of this multiple case study was to identify strategies information technology (IT) small business owners use to sustain operation beyond the first 5 years. The participants included four IT small business owners in the Southwestern United States who sustained operations beyond the first 5 years. Data were collected from semistructured interviews, company documents, and artifacts. Thematic analysis of the data resulted in three themes: judicious management of financial capital, customer satisfaction, and industry education and experience. A key recommendation is for entrepreneurs to sustain financial capital by managing expenses efficiently to keep costs low during the first 5 years of operation. The implications for positive social change include the potential for improved IT small business sustainability, leading to an increase in job creation, lower poverty rates, and an improved standard of living for the surrounding communities.

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Section 1: Foundation of the Study

Background of the Problem

Two out of three new jobs are created by small businesses in the United States each year, and over 50% of Americans either own or work for a small business (U.S. Small Business Administration [SBA], 2020b). Starting a small business is common, but many small business owners do not have the necessary skills needed to sustain business operation because 50% will fail within the first 5 years (Johnson, 2017). Over 50% of small businesses will discontinue their operation within the first 5 years (SBA, 2019a). Entrepreneurs face uncertainty and a variety of challenges in business efficiency, performance, and finance to sustain operation (Smith, 2020). Johnson (2017) concluded that many small business owners are passionate about their product or service but do not have the necessary skills needed to develop strategies and goals for sustainability. I explored strategies successful small business owners adopt to sustain business operations beyond their 5-year anniversary.

Problem Statement

Many small business owners lack the skills needed to sustain operation and fail at a high rate (Lai et al., 2018). Only 50% of all small businesses survived longer than 5 years (SBA, 2019a). The general business problem was that many small businesses fail during the first 5 years of operation due to a lack of sustainability strategies. The specific business problem was that some information technology (IT) small business owners lack sustainability strategies to survive the first 5 years of operation.

Purpose Statement

The purpose of this qualitative multiple case study was to explore sustainability strategies IT small business owners use to survive the first 5 years of operation. The target population consisted of four small business owners in the IT industry in a southwestern U.S. state with successful experience in using sustainability strategies to survive the first 5 years of operation. The implications for positive social change include the potential to improve business operations for current small business owners and provide insight into successful business strategies for future small business owners to promote sustainability and, thus, create more jobs for a stronger economy.

Nature of the Study

Researchers use the qualitative research method to answer questions by uncovering the thoughts and actions of a specific group of people (Jonsen et al., 2018). Researchers use the quantitative research method to try and prove or disprove a hypothesis using statistical data (Schneider, 2015). Barnham (2015) postulated that quantitative researchers observe the numerical relationships between variables through collected data. Researchers use the mixed-method approach, comprised of both qualitative and quantitative characteristics, to determine relationships and answer problem statements (Razali et al., 2016).

The qualitative research method was most appropriate for this study to explore methods of sustainability from individuals in existing successful business environments. The quantitative approach was not a suitable methodology for the study because I did not use statistical analysis to classify variables or construct a statistical model of

relationships to answer the question regarding business sustainability. The mixed-method approach was not appropriate because I did not measure fact or dependent variable numerical data requiring a quantitative arm in the study.

I considered multiple qualitative research designs for the study, including case study, ethnography, and phenomenology, before deciding on the case study design. Researchers use the case study design to explore real-life situations and examples from a subset of a larger group (Heale & Twycross, 2018). Hyett et al. (2014) described the case study design as offering flexibility in methodology through diverse standards, designs, and methods. I used the case study design as a foundation for analysis and triangulation of real business owner experiences to determine what methods IT small business owners use to sustain their businesses beyond the first 5 years of operation. I used a multiple case study design because of the flexibility and ability to conduct methodological triangulation of data collected through semistructured interviews and organizational documentation. Reichow et al. (2018) suggested that a single case study design is less reliable and presents a greater risk of bias. I did not use a single case study because I gathered information from more than one IT small business owner for greater data reliability and to prevent a greater risk of bias possible in a single case study. Researchers use the ethnographic design by identifying beliefs and feelings of a group through observation or surveillance (Cruz, 2016). The ethnographic design was not appropriate for the current study because it did not include the daily study and investigation of a group. Moustakas (1994) stated that the phenomenological design relates research to ideas and qualities. The phenomenological design was not suitable for this study because I did not address

individual lived experiences as the primary form of collecting data to answer the overarching research question for the study.

Research Question

What sustainability strategies do IT small business owners use to survive the first 5 years of operation?

Interview Questions

1. What sustainability strategies did you use to survive the first 5 years of operation?
2. How did your employees respond to those sustainability strategies?
3. How were sustainability strategies used to survive the first 5 years of operation communicated throughout the organizational ranks and among stakeholders?
4. What modifications did you apply to any sustainability strategy to improve its effectiveness in surviving the first 5 years of operation?
5. What policies and processes have you used to survive the first 5 years of operation in your organization?
6. What were the key barriers to implementing sustainability strategies used to survive the first 5 years of operation?
7. How did you overcome the key barriers to implementing sustainability strategies used to survive the first 5 years of operation?
8. What else would you like to add about sustainability strategies used to survive the first 5 years of operation?

Conceptual Framework

The conceptual framework for this study was composed of the entrepreneurship theory. Schumpeter (1942) created the entrepreneurship theory, theorizing that the economic evolution shapes societies (Audretsch, 2015). Entrepreneurs drive circulation and competition, affecting the economy significantly with innovation and creative destruction (Audretsch, 2015). Small businesses satisfy demand, increase competition, and influence innovation and technology within business operation (Ikemefuna, 2016). Small business sustainability literature complements elements of entrepreneurship theory because entrepreneurs take risks when starting and operating businesses, and as they grow and succeed, so do the communities and economies around them (Ikemefuna, 2016).

Entrepreneurship theory was appropriate to use as the conceptual for the current study because, according to Kurczewska et al. (2020), the theory could provide a lens to explore critical sustainability characteristics, knowledge, and skills of successful entrepreneurs. Entrepreneurship theory was suitable appropriate for this study because this lens and framework coincided with exploring strategies small business owners use to sustain operation beyond the first 5 years of operation.

Operational Definitions

Business sustainability: The actions and decisions that enable the continued operation of a small business (Johnson, 2017).

Human capital: The knowledge, skills, personal attributes, and habits that employees learn or bring to the company (Lin et al., 2019).

IT small business: An independently owned, technology-oriented business with less than 500 employees (Rambe, 2018).

Small business: An organization with less than 500 employees that is owned independently (SBA, 2018).

Small business success: An independent business that has survived beyond the first 5 years (SBA, 2019a).

Sustainability: The ability to effectively support and keep something going (Bush, 2016).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are unverified ideas that the researcher believes to be true (Brinkmann, 2016; Durkin et al., 2020). I made three core assumptions in this study. The first assumption was that a qualitative method of research was adequate to determine valuable strategies IT small business owners can use to sustain operation beyond the first 5 years. The second assumption was that the participants in the multiple case study would be candid and truthful in their responses to the interview questions. The last assumption was that the four IT small business owners that participated represented an adequate sample size to achieve data saturation pertaining to IT small business strategies used to sustain operation beyond the first 5 years.

Limitations

Limitations are uncontrollable factors that a researcher faces during a study that have the potential to weaken the research (Morgado et al., 2017; Yin, 2018). Limitations

can influence the validity and integrity of the research design and results (Greener, 2018). I identified three main limitations in this study. The first limitation was the sample size of IT small business owners. The four participants for this study may not fully represent the entire IT small business owner population. A study with a larger sample size could provide more details and insights into IT small business sustainability strategies. The second limitation was that the study only took place in the geographic area of the southwestern U.S., and the risk that the findings may not transcend nationally or globally. Lastly, participants may have limited their disclosure of trusted or adverse knowledge and experiences in their responses to interview questions.

Delimitations

Delimitations are characteristics that narrow the focus of research, and researchers use them to define the boundaries of the study (Yin, 2018). The first delimitation was that I only included IT small business owners in a southwestern U.S. state who have sustained operation beyond the first 5 years. Secondly, I limited the data sources to interviews and physical documents and excluded other means of gathering data. The study did not include small business owners: (a) from other industries, (b) from other regions, (c) in business for less than 5 years, and (d) with more than 200 employees.

Significance of the Study

Current and future small business owners could use the findings of this study to obtain strategies to sustain small business operation beyond the first 5 years. Small business owners can use these strategies to develop and plan their new businesses, improve their current operation, and/or increase the likelihood of sustaining business past

the first 5 years of operation. Park and Campbell (2018) identified small businesses as key contributors to community stability and success. The sustainability of small businesses in the community can improve the economy and society as well as increase the confidence of other entrepreneurs to start their business.

Contribution to Business Practice

In the United States, 99.7% of employers have less than 500 employees, and these small businesses create significant value for their communities (SBA, 2019a). Small business owners could use the study findings to develop strategies to establish and sustain the operations of their small businesses and benefit their communities. Small business owners might also find insight into the specific methods and strategies needed to improve business sustainability. Aspiring entrepreneurs could gain confidence from the study findings to better prepare and launch a small business. Another contribution of this study to business practice might be closing gaps in small business sustainability research and providing guidelines for current and future small business owners to use to sustain business operation beyond the first 5 years across industries.

Implications for Social Change

Society may benefit from the results of this study and the IT industry sustainability strategies identified because they can be used to help business owners. The number of studies available about successful small business strategies for entrepreneurs to reference when starting and growing a business is limited (Depken & Zeman, 2018). Current and future small business owners can adopt the strategies found in the current study to promote aspects of business processes to influence longevity.

Successful IT small businesses partner, collaborate, and innovate to create business value and benefit their communities (Laage-Hellman et al., 2018; Neagu, 2016). Neagu (2016) concluded that the health of the economy can be measured by the number of successful, active small businesses in the community. Successful business practices can help entrepreneurs advance the local economy, which may reduce poverty and unemployment rates (Pinkovetskaia, 2019). Business owners that sustain business operation may increase confidence in the economy and entice more entrepreneurs to start small businesses, adding jobs to the local community.

A Review of the Professional and Academic Literature

The review of academic literature is a crucial aspect of a research study, and in it, the researcher dives into the background of the study topic and phenomenon to synthesize scholarly resources (Baker, 2016). The literature review provides a foundation of existing topics and contributions to the research topic and fills gaps in the research (Cambridge, 2018). Systematic literature reviews provide a comprehensive view of theoretical and research practices (Rauch, 2020). This literature review includes a synthesis of research related to the conceptual framework of the entrepreneurship theory and the various concepts related to it. In addition, I discuss alternative theories and explore existing strategies small business owners adopt to sustain operation beyond the first 5 years.

The purpose of this qualitative multiple case study was to explore sustainability strategies IT small business owners use to survive the first 5 years of operation. Small business sustainability is widely researched because of the inability to define a set strategy or formula for businesses to adopt for success. The SBA (2018) defined a small

business as a company with fewer than 500 employees. About 51% of small businesses fail within 5 years of opening their doors (SBA, 2019a). In this subsection, I describe various theories and strategies that IT small business owners could adopt to sustain operations beyond the first 5 years.

To search for scholarly, peer-reviewed resources, I used the following databases and search engines: (a) Academic Search Complete, (b) Business Source Complete, (c) Google Scholar, (d) ProQuest Central, and (e) Sage Premier. The literature review contains 153 references, including 134 peer-reviewed journals, 12 dissertations, three government resources, two books, and two conferences (see Table 1). Of the reviewed sources, 88% were peer reviewed and 80% were published between 2018 and 2022. The study has 275 total references, including 245 peer-reviewed journals, 12 dissertations, nine books, six government resources, and three conferences. Of the total reviewed sources, 89% were peer reviewed and 70% were published between 2018 and 2022.

Table 1*Source Accountability for the Literature Review*

	Reference Counts	Percentage of Total References
Reference type		
References (books, journals, websites, dissertations)	153	100%
Peer-reviewed references	134	88%
References published 2018-2022	122	80%
References from dissertations	12	8%
References from government websites	3	2%
References from books	2	0.3%
References from conferences	2	0.3%

Conceptual Framework: Entrepreneurship Theory

The conceptual framework for this study was composed of the entrepreneurship theory. This theory was most appropriate for this qualitative multiple case study because of the breadth of concepts associated with the theory that directly relate to the methods researcher's use to study small business survivability. Schumpeter (1942) created the entrepreneurship theory, theorizing that the economic evolution of small businesses shape societies. Schumpeter described an entrepreneur and the influence on economic development and sustainability in the seminal work, *The Theory of Economic Development*. Schumpeter postulated that entrepreneurial innovation is the key to driving business success and ensuring small business sustainability, adding that innovation involves the constant change and improvement of concepts, representing the impact of growth in an economy.

Small business owners can create a competitive advantage and positively influence the communities around them through innovation. Entrepreneurs face a variety of challenges, and only those that continually innovate can survive and positively

influence the communities around them (Schumpeter, 1942). Entrepreneurs need to have the competence to manage various business functions, such as managing resources, managing threats, and adapting to changing environments, to maintain competitive advantage and sustain business operation (Schumpeter, 1942). Business owners and leaders in all industries that fail or refuse to innovate cannot survive.

Continued innovation for survivability has never been truer than in the modern era of business operation. The entrepreneurship theory concepts are the framework of entrepreneur business development and are crucial for entrepreneurial success and positive societal influence (Cassar, 2017). Entrepreneurs can positively influence industry competition, leading to economic growth and job creation (Ordu, 2020). Researchers using entrepreneurship theory to conduct studies regarding economic stimulation have identified multiple factors and ideas to influence small business sustainability, including (a) leadership skills, (b) business strategy, (c) innovation, (d) capital, and (e) profitability (Cassar, 2017). These ideas and concepts should be further studied and synthesized to create knowledge for current and future small business owners. Entrepreneurs could use the results of pertinent and complementary small business sustainability research studies to adopt and influence healthy operation tactics and improve competitive advantage for small business sustainability.

A small business owner can directly and indirectly impact the success of their own business and the growth of their surrounding communities. Entrepreneurs drive circulation and competition and can positively impact the economy with creative and innovative products and services (Ekinici et al., 2020; Ordu, 2020). Seid (2020) conducted

a qualitative case study on small business sustainability grounded in the entrepreneurship theory and concluded small businesses with good financial and marketing strategies can sustain operation and have a positive impact on their local communities. Small business owners represent 99.7% of all U.S. firms, employing half of the private sector and positively impacting their local economies (SBA, 2018). Small businesses satisfy demand, increase competition, and influence innovation and technology within business operation (Ikemefuna, 2016).

The findings of small business sustainability literature complement elements of entrepreneurship theory. Entrepreneurs take risks when starting and operating businesses, and as they grow and succeed, so do the communities and economies around them (Ikemefuna, 2016). Small business owners can innovate and create new products or services but have no guarantee of survival because of the many internal and external factors that influence entrepreneurial success (Alberti et al., 2018). Fisher et al. (2020) grounded their study of businesses success factors in the entrepreneurship theory and identified that business leaders that inspire innovation and an entrepreneurial spirit in historically institutionalized organizations can positively impact sustainability. Fisher et al. added that the freedom to innovate business processes improved business operation, human capital, employee engagement, and overall business success. Wani (2018) also used the entrepreneurship theory as a conceptual framework to study factors that influenced the sustainability of small grocery store businesses and found that entrepreneur management skills, resource management, and effective strategic planning help to gain a competitive advantage.

Entrepreneurs with business education and industry experience can be more effective leaders and sustain operation. Entrepreneurship theory is a foundation for understanding how and why successful entrepreneurs start new enterprises and innovate products, services, and processes for success (Yang, 2016). Ayala and Manzano (2014) found that business experience, education, and leadership skills were elements of entrepreneurship theory that contributed to entrepreneurial success.

Entrepreneurs with a high level of business knowledge are more successful than entrepreneurs without business industry education and experience. Kurczewska et al. (2020) used the entrepreneurship theory in their study of small business success factors and concluded that small business owners with greater business education and experience were more likely to both start and sustain business operation. Kurczewska et al. added that a higher level of education improves problem-solving skills and critical-thinking abilities needed to maintain a successful small business. Yang (2016) also used the entrepreneurship theory in a study of small retail business owner success and concluded that small business owner education and training and community involvement influenced competitive advantage and the company's survival beyond the first 5 years. Yang added that small business owners take advantage of industry gaps to create opportunity, competitive advantage, internal business environment, and a recognizable external brand.

Business strategy and strategic decision making are key elements of entrepreneurship theory in small business research (Cassar, 2017). Starting a small business is risky, and entrepreneurs must remain agile and make strategic decisions through startup and in day-to-day processes to sustain operation (Ekinici et al., 2020).

Entrepreneurship theory is a foundation for small business researchers to understand the methods that entrepreneurs use to start and maintain business operation through strategy, innovation, and development (Dorin & Alexandru, 2014).

Entrepreneurs begin new business ventures for a variety of internal and external reasons and often face challenges. Entrepreneurs make decisions to start businesses out of opportunity or necessity (Porfírio et al., 2020). When a profitable business opportunity presents itself to an entrepreneur, the entrepreneur attempts to organize an operation to exploit the opening (Snihur et al., 2021). In a study about small business success rooted in entrepreneurship theory, Porfírio et al. (2020) concluded that successors to small businesses that were provided a small business opportunity were more successful than entrepreneurs that started a new small business out of necessity. Porfírio et al. postulated that entrepreneurs that had an established strategy and operational foundation were able to make decisions based on historical data and success measures to sustain operation.

Small business owners can face challenges but can be rewarded with financial freedom and independence when leaders are successful. Entrepreneurs face adversity but often realize independence, financial freedom, and career advancement if they overcome challenges to build and maintain a strong business (Ostrow et al., 2019). Entrepreneurs should understand the processes of starting a small business and need to create an effective strategy and identify necessary resources to be successful (Sarkar et al., 2018). Even with known challenges, more people are becoming entrepreneurs to address unmet needs to gain or maintain their independence by serving their self-interests and collective interests (Hoogendoorn et al., 2019).

Entrepreneurs can create healthy competitive advantage and have a positive influence on the economy. Small business owners construct and implement strategies for success with the hope of creating a competitive advantage and positively influencing the community around them (Soundararajan et al., 2018). The advantages of small business ownership and entrepreneurship's influence on society through starting a new venture are key factors of entrepreneurship theory (Cassar, 2017). There are many knowledge resources available to current and future small business owners to influence, assist, and promote starting a new business (Shawky et al., 2021).

Entrepreneurs have access to many resources to learn about small business strategy and sustaining a new venture in today's business, educational, and social environment. Small business strategy formulation is a key component of the entrepreneurship theory (Cassar, 2017). The SBA (2019b) has over 1,000 centers nationwide that support small business communities. Small business owners can access information and learn from others' successes and failures via a large variety of channels, and there are many local, state, and national government resources available for assistance and information about the processes to follow to begin a new venture (SBA, 2019b).

Entrepreneurial research is popular because of the multiple factors and variables associated with creating and sustaining operation. There are no specific formulas entrepreneurs can follow to ensure success, but when businesses are successful and strong, so are the economies around them (Soundararajan et al., 2018). In a study grounded in the entrepreneurship theory, Gardner (2019) concluded that small businesses

stimulate job creation when the business owners or leaders can appropriately manage small business decisions about financial capital and maintaining a competitive advantage. The study of small business success factors has gained traction with practitioners and researchers because small businesses are the foundation for developing and sustaining successful economies (Malesios et al., 2018). Small business sustainability and social impact research continues to grow in popularity to promote and support new, current, and future small business owners to take risks to start businesses and drive economic development (Soundararajan et al., 2018). Entrepreneurship theory researchers describe small business owners as opportunistic, and the theory may serve a foundation to analyze data to provide insight into strategies small business owners use to sustain operation beyond the first 5 years.

Entrepreneurship theory is a framework centered on the influence small business owners have on their surrounding economies through successful operation amid economic risk and market uncertainty (Priest, 2021). Priest (2021) concluded that entrepreneurs need to start innovative companies, and existing small business owners need to innovate to sustain operation and maintain positive, external impacts. Small businesses are the building blocks of a successful economy (Malesios et al., 2018).

Successful small business owners are the foundation of strong economies. Successful small businesses owners maintain their personal well-being and financial freedom while simultaneously improving the economy and community around them with employment, development, and growth opportunities (Soundararajan et al., 2018). In a study about small business sustainability factors that was grounded in entrepreneurship

theory, Dyer (2019) found that small business owners need access to capital to fund the start of the business and an entrepreneurial spirit to be successful. Dyer added that when small business owners are successful their local economies grow, unemployment rates decrease, and the standard of living in their local areas improve.

Small business owners provide employment opportunities for many citizens at all income levels. Small business owners employ 48% of private sector employees in the United States (SBA, 2018). Most of the small businesses in the United States help maintain, support, and enhance the well-being of the economy (Bonsu & Kuofie, 2019). The increase in the number of successful small business owners sustaining operation beyond the first 5 years can increase the economic standing of the area. Sadovnikova et al. (2021) concluded that improving small business sustainability can positively influence the economic standing of an area.

Successful entrepreneurs can impact multiple aspects of the communities around them. The entrepreneurship theory concept of economic development through small business success directly impacts the growth and production of the economy and positively impacts a population's poverty statistics (Abisuga-Oyekunle et al., 2020). Lum (2017) conducted a study grounded in the entrepreneurship theory about small business owners that aligned their decisions with set goals and innovated effectively to sustain their operation beyond the first 5 years, finding that the business, employees, and the economy all benefited from the continued operation of the small business.

Entrepreneurs who are successful in sustaining operation beyond the first 5 years and continue to grow their business need a growing staff. A small business owner's

success can directly influence unemployment statistics by producing more job opportunities (Abisuga-Oyekunle et al., 2020). Mencken and Tolbert (2018) postulated that successful small businesses owners can reduce poverty in their economy by fostering growth and employment opportunities.

Small business owners play a key role in providing a livable income for a large portion of their surrounding community workforce and company growth and success directly impacts greater job creation and economic stability (Yazdanfar & Öhman, 2018). The entrepreneurship theory is a framework researchers can use to analyze the impact that the success of small businesses in an area has on the success of their surrounding economy. Small business owners sustaining business operation are key to economic advancement and a reduction in poverty (Agu et al., 2018). According to the SBA (2019a), small businesses were responsible for creating 9.6 million net new jobs between 2000 and 2018 in the United States but are failing at high rates.

The entrepreneurial theory is a lens to identify strategies small business owners use to sustain business operation beyond the first 5 years. Analyzing the research associated with small business sustainability could support small business owners in their pursuits to ensure they sustain operation and continually impact economic development. The entrepreneurship theory may be appropriate for this study to determine strategies small business owners can adopt to start and maintain business operation beyond the first 5 years to decrease the small business failure rates and sustain or improve growing economies around the world.

The conceptual framework is critical to a research study and can guide appropriate research collection, analysis, and synthesis. Entrepreneurship theory may be appropriate conceptual framework for this study of small business sustainability strategies. Researchers can use the entrepreneurship theory as a lens to explore critical sustainability characteristics, resources, and strategies successful small business owners use (Ahlstrom & Ding, 2014).

Entrepreneurship theory may be most appropriate for this study because I could use the theory as a lens and ideas that coincide with exploring specific strategies small business owners can use to sustain operation beyond the first 5 years of operation. Entrepreneurship theory could provide a lens into the various reasons small business owners start businesses for themselves and for the positive influence they have on their surrounding communities.

Alternative Theories

In addition to entrepreneurship theory, there are various theories researchers use to explore entrepreneurial skills and small business success factors. Upon exploring other theories, I have confirmed that the entrepreneurship theory is the most appropriate for this study. Alternate theories that I considered were the human capital theory and the resource-based theory. Entrepreneurship theory was the most suitable, but each of these additional theories provide supportive concepts related to small business sustainability as well.

Human Capital Theory

Human capital theory researchers focus on fundamentals and influence that the company personnel have on a company's success. Researchers that ground their studies in the human capital theory explore benefits small businesses can realize with the attention and investment in current and future human resources (Lopes da Silva et al., 2020). Human capital is the knowledge, skills, personal attributes, and habits that employees learn or bring to the company to move the organization's leaders closer to established goals and positively influence sustainability (Lin et al., 2017, 2019). Becker (1962) introduced the human capital theory and contributes to the study of sustainability through organizational productivity. Becker theorized that there are fundamental ideas related to personnel that contribute to a company's success to include (a) on-the-job training, (b) increased education, (c) higher compensation, and (d) economic growth. Human capital strategies and topics are key components in all small business sustainability research.

Human capital theory researchers find that leaders need to recognize the importance and value of hiring skilled employees and investing in continued skill development for their employees to improve small business sustainability (Lin et al., 2017). Human capital is the quality and combination of experiences and competencies of company contributors and small business owners should promote the continued development and training of their employees to foster economic influence, sustainable growth, and competitive advantage (Lin et al., 2017). Organizational goals are more often achieved when leaders invest in human capital and improve employee knowledge and

skills (Lin et al., 2017). Small business owners often have difficulty identifying and deploying training efforts due to time and resource gaps but can learn to identify when training is needed and create economical and beneficial action plans to increase productivity through appropriate training and development (Csillag et al., 2019).

Entrepreneurs can analyze the business needs and the current human capital to determine if on-the-job training or formal education and training outside of the organization would be most advantageous (Yuan & Wang, 2018).

Employee compensation is a concept of human capital management that is often overlooked or ignored by small business owners. Human capital management researchers provide insight into the fundamental concepts related to people management that some small business owners often overlook and create collaboration for research quality (Xu et al., 2018). Employee compensation is a vastly studied topic of human capital theory researchers (Lin et al., 2019). Groups of individuals with the same title and job description are often compensated equally versus based on individual performance (Yunalfian & Yunirsan, 2019).

Small business owners should be transparent about their employees' potential and path for growth in knowledge and pay within the organization (Ertel, 2019). Improper compensation management and failing to acknowledge and reward performance can negatively influence employee loyalty, turnover, and overall business sustainability (Prasetio et al., 2019). I considered human capital theory for this study but determined that human capital theory is too specific because of the many other aspects associated with small business sustainability research.

Resource-Based Theory

Internal and external resources are a major part of any business. Resources are physical or nonphysical things that contribute to and support business operation, and the unique combination of resources deployed by a small business owner can influence competitiveness (Pomegbe et al., 2020). All business owners acquire and manage various types of resources in different ways. Business owners are tasked with making resource decisions for the greater good of the company and to improve sustainability (Pomegbe et al., 2020). I considered this conceptual framework because of the focus on the sustainability aspects of managing resources appropriately to prolong business operation. Penrose (1959) developed the resource-based theory to provide a foundation for the ways business owners decide how to use company resources to achieve company goals.

Resource-based theory supports the entrepreneurial theory for small business research because they both explore sustainability and competitive advantage. The resource-based theory is a valuable tool to help small business owners understand success drivers (Ginger & Wesley, 2020). The resource-based theory is appropriate for research pertaining to small business sustainability because the methodological elements offer a framework for ways to incorporate a mixture of resources to formulate successful business strategy for sustainability (Chahal et al., 2020). Leaders make strategic decisions to use tangible and intangible resources to sustain operation and create or maintain a competitive advantage. Abeysekera (2019) performed a quantitative case study using the resource-based theory and analyzed 276 companies in Australia to determine the effectiveness of intangible communication tactic effectiveness. Small business can use

intangible resources such as strategic content to include timelines, growth, and earnings to influence company reputation and brand (Abeysekera, 2019).

Internal resources, both tangible or intangible, can establish competitive advantage and sustain business operation if managed appropriately. Bacq and Eddleston (2018) explained that researchers use the resource-based theory to apply resources and capabilities effectively to influence business sustainability factors. Tangible resources are physical, technological, and financial in nature that require intervention to create value while intangible resources do not have physical substance, such as human, relational, and knowledge assets (Rajchelt-Zublewicz et al., 2019). Intangible assets are unique and complex in nature such as knowledge, patents, and brand recognition. Intangible assets are much harder to imitate and are perceived to provide a greater competitive advantage than tangible resources (Bacq & Eddleston, 2018).

According to a quantitative study Kamasak (2017) conducted, intangible and tangible resources do not have a considerable difference associated to performance measures and sustainability of a company. Kamasak added that resources of all types are equally important and can promote success if acquired and managed effectively. Resource-based theory complements aspects of the entrepreneurial theory, but again, is very specific to one aspect of business sustainability efforts versus providing a wholistic review of small business sustainability topics.

Entrepreneurial Orientation

The small business owner plays a key role in legally establishing the business, performing all start-up activities, and managing operation for success. Entrepreneurial

orientation in small business sustainability studies alludes to the personal qualities, characteristics, and mentalities common with successful small business owners (Hiung et al., 2019). Zhu et al. (2020) postulated in their quantitative study of small business owner personality and personal characteristics that not all successful small business owners are the same and concluded that innovativeness and a great need for achievement were the top two traits that successful small business owners possessed. Manzano-García and Ayala-Calvo (2020) studied the impact that an entrepreneur's orientation had on small business success and concluded that a small business owner's positive and proactive orientation directly impacted the owner's satisfaction and growth.

Entrepreneurial orientation describes the unique abilities and aptitude most successful small business owners possess. This represents the personal characteristics of the small business owner and is independent from business strategy and objectives. Vieira et al. (2020) concluded in a study about how personality traits can influence the capital structure of a small business that owner characteristics had influence on views, mission, and success of the business. All entrepreneurs face risks and challenges in their endeavors, and these risks and challenges can be different based on industry, but entrepreneurial orientation is a main contributor to the success of a small business (Ueasangkomsate, 2019).

Self-Efficacy

Successful small business owner self-efficacy can influence small business success. Self-efficacy of small business owners is the self-confidence and belief that they will be successful in their actions. Poggese et al. (2017) described self-efficacy as a

person's cognitive belief that their actions and feelings of competence when handling business tasks can successfully or unsuccessfully achieve an endeavor. Poggesi et al. postulated that, if small business owners envision and believe in success, they are more likely to realize that success than individuals who have doubts about their success or have low self-efficacy. Santoro et al. (2020) concluded in their study of self-efficacy of disadvantaged small business owners that an entrepreneur's combination of self-efficacy and resilience has a positive influence on small business success.

Small business owners with self-efficacy often overcome obstacles other small business owners cannot overcome to sustain business operation beyond the first 5 years. Self-efficacy may compensate for deficiencies in experience and resources, and the more optimistic the small business owner is, the more likely to grow the business and succeed (Wasowska, 2019). When small business owners have full confidence in their entrepreneurial success, they are more likely to take risks and find ways to overcome roadblocks to endure issues and improve sustainability (Wasowska, 2019). Entrepreneurial experience and business resources are key topics of small business sustainability studies. Yancy and Esteban (2019) explained that experiences could influence entrepreneurs' decision making, and small business owners with greater experience are more likely to succeed. Small business owners with self-efficacy can overcome a low experience disadvantage and compete with more experienced and established small business owners (Wasowska, 2019).

Self-efficacy of small business owners is not always consistent, but there are actions entrepreneurs can take to influence self-efficacy at different stages of small

business ownership, and anyone can have and improve their confidence in starting and sustaining business operation. Small business owners can take certain actions and influence their self-efficacy. Wasowska (2019) concluded that a small business owner's age, gender, or work experience did not influence self-efficacy, but having a business mentor or role-model influenced the level of self-efficacy. Entrepreneurs can influence their own self-efficacy to overcome obstacles and improve the likelihood of positively influenced sustainability. In a study Tiwari et al. (2019) conducted about entrepreneur intentions, self-efficacy was the greatest influencer on small business owners to start a business.

The more knowledge a small business owner can gather from resources of all types for starting, managing, and sustaining a business, the more the increase in their self-efficacy, improving chances of sustaining business operation beyond the first 5 years. Self-efficacy for a small business mission, strategy, and operation influences small business success and increases the small business owner's personal connection and dedication to the company's success. Strengthened connection and dedication to the small business turns into a greater passion and feeling of accountability for the small businesses' success.

Accountability and Passion

Some small businesses emerge from an entrepreneur's personal passion and enthusiasm for an innovative product or service. Entrepreneurs have a passion for what they do and how they operate based on their past experiences and unique set of skills. Raco et al. (2019) postulated that small business owners can sustain operation if working

in an industry that they find enjoyable and enables them to better serve people.

Entrepreneurs are passionate about their business, brand, and the personal and social benefits of controlling their own time and future (Yang, 2016). Small business owners often have sincere emotions tied to their initiative to manage risks and creativity to turn ideas into action (Ordu, 2020). Entrepreneurs feel as if their small business venture is an extension of themselves and express themselves in many forms and fashions on the business (Ordu, 2020).

Small business owners that feel highly accountable and responsible for their company's success are more likely to succeed. Entrepreneurs are motivated to maintain a successful business because of the accountability they have to their internal and external stakeholder expectations (Fischer et al., 2020). Entrepreneurs feel a personal accountability to the success of their small business (Ordu, 2020). Small business owners make strategic decisions and take risks and there are resources available to assist in making education decisions. Trang et al. (2019) concluded that small business owners were more successful when they had a personal connection with an entrepreneur and if they attained supplemental knowledge and experience. Small business owner insight and understanding to strategize and make appropriate small business decisions is needed for success (Hinz, 2017). Passion and accountability are key components of a business owner as related to the entrepreneurial theory to sustain business.

With passion comes self-efficacy and confidence to manage a business. Small business owners can overcome operational and managerial challenges with the confidence to make difficult decisions (Sirilarbanan, 2017; Turner, 2016). Passion and

dedication can directly influence entrepreneur motivation (Fisher et al., 2018). Small business owner confidence in decision making, and the aptitude and experience to ensure most of those decisions have positive outcomes, are necessary for small business sustainability (Sirilarbanan, 2017). Passion for the business mission and purpose keep small business owners resilient and dedicated to pushing forward to overcome any obstacle to expand and sustain business operation (Adomako et al., 2020).

Dedication

An unyielding dedication of the small business owner to the success of the business is necessary for business sustainability, and most small business owners have a passion for their businesses and are dedicated to the companies' success. Majukwa et al. (2020) conducted a qualitative multiple case study to explore sustainability strategies for small-and medium-sized businesses and concluded that passion and dedication was one of four major themes that influenced small business owner success. In a study of small business sustainability, Solis (2016) described factors that successful small business owners have a drive for success and feel an extreme discomfort and fear of failure. Entrepreneurs make difficult decisions and must be dedicated to the time and attention necessary to remain agile when faced with challenges (Solis, 2016). Successful small business owners are dedicated to making difficult decisions and changes when necessary to start and maintain an organization (Solis, 2016). When the owner is dedicated to the business operation, sustainability increases with higher productivity, employee engagement, and profitability.

Some entrepreneurs begin small businesses as a side-job and do not dedicate all their time and attention to the success of the venture. Entrepreneurs can have a hard time realizing success and sustaining operation beyond the first 5 years if there is not a high level of dedication. Ma et al. (2020) concluded in a study about a small business owners' dedication, and the relationship between dedication and opportunity identification, that there is a direct relationship between entrepreneurial dedication and successful business opportunities within small business owners' social ties. Jacobs et al. (2016) concluded that full-time small business owners had greater business growth and success than part-time small business owners.

Entrepreneurs that can dedicate time and resources to an operation are more likely to successfully establish and maintain their business operation (Sun et al., 2020). In contrast, Kohn and Wewel (2018) researched skills, scope, and success small businesses in creative industries and concluded that when small businesses were managed on a part-time basis with minimal financial resources, the business owners were more innovative, and had an above-average sustainability timeframe. The majority of small business sustainability research supports the view of small business owner dedication to their business operation and success is a driving factor for success.

Leadership

Small business owners play the role of the leader of their organization and develop an internal and external image. There are varying perspectives and theories about the foundation of a successful leader and whether skills and interests are innate or learned through education, training, and experience (Bergner, 2020). Regardless, effective

entrepreneurial leaders can create and lead the company mission and strategy for the direction of the company (Bergner, 2020).

Effective leaders build upon a small business foundation to cultivate a successful operation and sustain business operation. The leadership actions of a small business owner should include a defined vision and strategy of the company to set defined goals and a clear direction for success (Irungu & Arasa, 2017). When entrepreneurs have a plan of action for their company and successfully lead the company, they are more likely to sustain business operation beyond the first 5 years. Ordu (2020) researched entrepreneurial leadership and concluded that successful leadership strategies and attributes are pivotal to sustaining business operation. Ordu postulated that small business owners who are not effective leaders, or do not have effective leaders managing their business, are at greater risk of losing their business.

Leadership skills and characteristics are studied across industries to determine necessary aspects to be a successful leader. Leadership theories have evolved into a primary focus of small business sustainability studies (Lai et al., 2018). Harrison et al. (2018) concluded that entrepreneurial, business, and interpersonal skills are essential to effective leadership in successful businesses. Kadwa and Barnard (2019) postulated that effective leaders have various leadership styles, but all maintain a balance of successful methods and traits. Sustainable small business potential and success relies on the small business owner's effective balance of leadership components (Kadwa & Barnard, 2019). Small business owners with effective leadership skills are more likely to cultivate and

motivate the right people to accomplish company goals and sustain business operation beyond the first 5 years.

Small business owners must be mindful of the leadership styles and qualities that proven and effective leaders possess. There are various leadership styles that can be successful, and a common theme in leadership research is the significant relationship between organizational performance and leadership style (Harrison et al., 2018). Qadir and Yeşiltaş (2020) postulated in a study of leadership styles that all types of leadership styles have some sort of positive effect on organizational performance. Qadir and Yeşiltaş concluded that effective leadership styles and methods that promote a shared enthusiastic mission and direction with all members of the organization can yield a more profitable and sustainable business operation.

Entrepreneurial Success

Entrepreneurs take a great risk starting a new small business venture, and the success of entrepreneurs is dependent on a variety of controllable and uncontrollable factors working in the small business owner's favor. Successful entrepreneurs normally benefit the needs of customers in the form of a product or service in a profitable manner, and the most important success factors can differ from one business owner to another (Tiwari & Goel, 2020). Companies are faced with a higher degree of competition in the business environment, but small business owners often remain optimistic in the face of competition and focus on internal strategy and innovation to impact performance (Byun et al., 2020).

Small business sustainability strategies relevant to this study all relate to the development or analysis of theories aimed at improved entrepreneurial success. Developing and implementing business strategies to meet goals, improve performance, and maintain competitive advantage is key to business sustainability and success (Gao, 2017; Hinz, 2017). Small business owners should lead strategically, adopt technology and innovation, manage resources effectively, and monitor competitive advantage to positively impact their business (Irungu & Arasa, 2017). There are numerous topics of study related to the general strategies small business owners can adopt to sustain business operation beyond the first 5 years. The following themes related to entrepreneurial success emerged in reviewing the academic literature.

Customer Service

The importance of customer service for small businesses is a central topic of small business sustainability research. Return customers create a foundation for small business success because their loyalty creates a customer base, and they share their experience and enthusiasm with others which creates an environment for long-term competitive advantage (Hawkins & Hoon, 2020). Superior customer service improves customer loyalty and motivates customers to return.

Entrepreneurs that sustain operation beyond the first 5 years maintain a customer satisfaction focus. Small business owners can focus on excellent customer service, which includes delivering timely, professional, and courteous service to all customers to promote sustainability (Bush, 2016). Small business owners can retain customers by maintaining customer focus and providing superior customer service (Hawkins & Hoon,

2020). Customers normally have many alternate options to what a small business has to offer from a product or service perspective. A business owner's focus on customer service can aid in business and social sustainability by creating suitable trust relationships with both customers and business partners (Lee et al., 2021). Small business owners focused on customer service strategies have pleased customers that become loyal and create a positive financial situation and improved competitive advantage (Eklof et al., 2018; Lachiewicz et al., 2018).

A small business reputation for great customer service creates repeat customers, positive word of mouth, and a competitive advantage. Satisfied customers become loyal to the company and companies can track customer satisfaction as a central definer of ideal customer service (Panno, 2020). Customer satisfaction feedback can be gathered during and after the business interaction to gauge customers' perceptions regarding the company's performance.

Satti et al. (2020) postulated that business owners should implement business methods to ensure quality products and services through the entire business interaction to develop customer satisfaction. Satti et al. found that there is a direct relationship between customer satisfaction and price paid for services. Cooper et al. (2016) concluded that lasting relationships with customers are built upon innovative customer service practices to maintain a high level of customer satisfaction and maintain long-term business operation. Small business owners should maintain a high level of customer satisfaction, take action to correct customer dissatisfaction, and innovate ways to improve customer

satisfaction and perception of the business to maintain a competitive advantage and sustain business operation beyond the first 5 years.

Strategic Business Planning

Strategic business planning is a key component of starting a small business and is the foundation for success. The small business owner's attention to detail is the root of business sustainability through preparation and business development while researching and starting an organization (Solis, 2016). Appropriate research of the industry and competition is necessary for small business success. A small business owner must identify and analyze all aspects of the business with a short- and long-term sustainability plan and vision in place (Bush, 2016). Small business owners can reduce stresses and challenges of starting a small business by implementing an effective business plan and strategy implementation (Turner & Endres, 2017).

Entrepreneurs can create, reference, and modify their strategies when necessary to maintain focus and competitive advantage. Many small business owners have difficulty implementing innovative strategies but need to adopt planning and development strategies to sustain operation (Karami & Agahi, 2018; Wang, 2019). The goal, mission, and vision of an organization create an image of its goals, but the strategy is the developed plan and path of action to gain an advantage over the competition and realize its goals (Dyer et al., 2016). In a study of business model design and performance relationships, Pati et al. (2018) postulated that developing a business model and strategy conducive to environmental variability is needed for greater performance. Pati et al. concluded that small business owners must successfully manage their business structure

and strategy around internal and external fluctuations in environment to be successful.

Welter et al. (2021) found that small business owners face challenges, but despite obstacles, small business owners can be successful with effective planning and implementations of business strategies.

Strategic planning by small business owners is necessary to remain relevant and to maintain a competitive advantage. Small business owners use business strategy to identify the specific market of competition, the unique value the organization can provide in the industry, the resources needed to offer this value, and ways to sustain their advantage over time (Dyer et al., 2016). Entrepreneurs are often faced with a variety of options to choose from and strategic planning is crucial to develop and sustain (Gans et al., 2019). Strategic plan formatting and decision making differ among organizations based on the organizations' culture, size, structure, and management style and should remain agile to react to internal and external change and opportunity for growth (González & Campbell, 2018).

Innovation

Small business owners greatly influence their economies by leading and developing innovation to create a competitive advantage. Small business owners need a robust innovation strategy to create and maintain a competitive advantage in ever-evolving markets (Titisari et al., 2018). Small business owners need to comprehend the significance of an innovation focus and strategy to sustain competitive advantage, organizational growth, and long-term operation (Soriano et al., 2019). Entrepreneur innovation is a primary source of new product development and technological

advancement that benefits businesses and consumers (Marques et al., 2019). Innovation creates internal and external value and involves the planning, developing, and implementing of a new idea (Harith & Samujh, 2020). Husti and Mahyarni (2019) concluded in a study of leadership, innovation, and competitive advantage that innovation directly relates to competitive advantage and the positive performance of small to medium sized businesses.

Entrepreneurs should continue to innovate to improve, create, and enhance business functions to create or maintain a competitive advantage in its industry (Distanont & Khongmalai, 2018). Small business owners should analyze direct and indirect competitor behavior and the competitive landscape to identify innovation opportunities and threats (O'Dwyer & Gilmore, 2019). There is a positive relationship between innovation efforts and small businesses' financial and sustainability performance (Lussak et al., 2020; Shashi et al., 2019). Shashi et al. (2019) concluded that innovation significantly impacted small business competitive advantage and survival rate and should not be ignored by small business owners.

Successful small business owners continuously innovate and adjust strategies to gain and maintain a competitive advantage. Felício et al. (2019) concluded that disruptive innovation influenced return on investment, sales volume, and competitiveness more than efficiency innovation but requires more flexibility and agility from the organization. Felício et al. suggested that entrepreneurs can have success with a product and work to grow and improve efficiency but fail to innovate in ways that can sustain the operation.

Cooper et al. (2016) concluded that small business owners that focus on more extensive and riskier endeavors versus minor improvements are more innovative and successful. Martinez-Torres and Olmedilla (2016) concluded that internal innovation communities could be an effective tool for companies as an open forum for employees to strategize and communicate strategic ideas. Small business owners can source internal and external ideas for innovative concepts and inspiration (Flowers & Meyer, 2020). Small business innovation practices at all levels of an organization can stimulate productivity and competitive advantage (Azeem et al., 2021).

Small business owners need to recognize the need to innovate in their operation and for their customers. External factors such as the competitive environment influence innovation practices just like internal factors (Prajogo, 2016). Dynamic and competitive business environments impact company effectiveness and innovation practices (Prajogo, 2016). Small business owners with successful disruptive innovation strategies have greater knowledge and competitive advantage (Wahyono, 2020).

IT

IT has become ubiquitous to businesses in every industry over the past two decades. Small business owners that adopt IT and innovation practices improve the efficiency of operation and can better withstand disruption of a volatile business environment (Ajibade & Mutula, 2021). Small business owners can implement IT to create value for a company if optimized to increase the organization's efficiency and performance (Qosasi et al., 2019). Early adopters of new technologies can take advantage of differentiation and form a competitive advantage (Bilgihan & Wang, 2016). Small

business owners can incorporate IT strategies to sustain competitive advantage and improve performance (Bilgihan & Wang, 2016).

Small business owners who are slow to adapt to industry technology changes restrict their competitive advantage, and other companies can pull ahead. Technology is rapidly changing, and small business owners can realize performance improvements as they invest and grow IT operations (Zhang et al., 2016). Akpan et al. (2022) asserted that organizations in emerging markets could implement advanced technology practices to compete against existing organizations and sustain operation amongst fierce competition. If organizational leaders can implement IT processes and strategies that are sustainable, they can also create sustainable employment for those in their communities.

IT investment, development, and implementation are considerations all small business owners need to analyze to determine ways to gain efficiency. IT is a business component that needs continuous development and adoption to gain or retain efficiencies and ultimately competitive advantage (Zhang et al., 2016). A competitive advantage exists when a company can sustain greater performance than other industry leaders and internal expectations (Bilgihan & Wang, 2016). Jácome et al. (2022) concluded that managers must realize that IT capabilities alone are not enough to achieve a competitive advantage, and IT innovation, development, and investment are necessary to generate and sustain the superior operations.

IT is a necessary resource in many ways for companies of all sizes to achieve and keep up with disruptive innovation (Yunus et al., 2019). Qosasi et al. (2019) described that the development of IT resources with all business functionalities could improve

performance. Small business owners can gain a sustained competitive advantage with strategic IT investment in today's business environment.

Motivating and Engaging Employees

Employee motivation and engagement is a widely studied topic and a crucial one for small business sustainability. High employee motivation and engagement increase business productivity (Uka & Prendi, 2021) and are highest in organizations with high profits (Solis, 2016). Brieger et al. (2020) argued that the perceived business environment is the most important factor for employee engagement and small business sustainability. Small business owners must motivate and make their employees feel satisfied with their work for sustainability. Flexible and collaborative work environments create an engaging and sustainable work environment (Setiyani et al., 2019). Leaders can maintain a strong culture with collaboration and cooperativeness (Gao, 2017).

Small business owners should consider the value of their employees' opinions and create an open environment of collaboration. The work environment could impact employee engagement (Huertas-Valdivia et al., 2018). Gao (2017) explained that businesses are more successful when employees are encouraged to engage in decision making and when leaders are transparent with business decision rationale for the good of the business, the employees, and its customers. Johnson et al. (2016) studied 626 sales professionals and determined poor job satisfaction and high turnover were causes of business failure. Mousa et al. (2021) concluded that when business leaders create an environment of inclusion, employees find their work meaningful and are inspired to perform well.

Small business owners should communicate the vital role they play at every level to meet high-level company goals. Effective communication of expectations can improve employee morale and engagement (Tkalac Verčič, 2021). Turner and Endres (2017) discovered that small business owners that communicate and encourage employees into company goal alignment set a foundation for future growth and success. Promoting desired business goals encourages the value of employee success and increases motivation (Katz et al., 2016). Unmotivated employees are less dedicated and tend not to work as hard as motivated employees (Gupta & Shukla, 2018).

Education and Experience

Small business owner knowledge and experience is an essential aspect of small business sustainability. Yang (2016) concluded education and training gave business owners confidence to start a business. Knowing the steps required to start a business and the business aspects that require attention during operation provide a basis for an aspiring entrepreneur. Smith et al. (2019) concluded that industry education and experience is a crucial part of leadership development to sustain a small business operation. Iva (2021) concluded in a study of small and medium-sized enterprises that there is a direct correlation between knowledge generation and business performance.

Entrepreneurs with business knowledge and skills are more successful in the long-term compared to entrepreneurs lacking knowledge and skills. Camisón-Haba et al. (2019) concluded the enhancing business knowledge and capabilities directly contributes to more accurate planning and strategy implementation for small business owners. There are multiple ways a small business owner can improve their overall knowledge of

managing a small business and maintaining a successful business in their industry.

Improving business knowledge can be realized through business education and business experience alike.

Entrepreneurs without a formal business education can also succeed based on their industry knowledge garnered from direct industry experience and knowledge. Cooper (2016) concluded that beyond the need for formal education to start a business, industry and business experience and knowledge are critical resources for small business owners to sustain business operations. Behling and Lenzi (2019) concluded in a study of entrepreneurial competencies and strategic behavior that small business owners with a higher degree of entrepreneurial competencies tend to adopt more successful and strategic strategies. Ali et al. (2020) concluded that although intangible skills such as creativity and experience do not directly lead to competitive performance, having these skills do positively impact the strategy and direction of the business operations. Formal education and industry experience enhance business knowledge and business sustainability in similar and different ways.

Formal Education and Training

Formal education constitutes the completion of college-level business courses, business certifications, and specialization training. Lai et al. (2018) concluded that many small business owners lack the skills needed to manage an operation and motivate employees successfully. Lai et al. explained that entrepreneurs often learn as they go through establishing and managing their own small business instead of having all information and details they need before going into small business ownership.

Current and future small business owner formal education positively impacts business sustainability. Knowledge of processes to begin, manage, and innovate for small business sustainability are essential for small business owners. Porfírio et al. (2020) concluded that small business owners sustained operation more successfully when the business owner had a formal business education when they studied 383 observations of small businesses from six different European countries. Hemazro and Turner (2016) studied small businesses with the conceptual framework of entrepreneurial theory and discovered that formal education is a crucial component to small business owner skills and company sustainability. Hemazro and Turner suggested that formal education is a foundation for entrepreneurial success and can positively influence a small business's growth.

The literature supporting the positive impact that formal education has on small business sustainability is relevant to the study of small business owners' strategies to sustain the business operations. Pavlovic et al. (2019) performed a mixed methods study of small business owner success after the owner completed an Advanced Entrepreneurship Program and found that average revenue increased by 63%, and the business had 2.2 net new jobs within 1 year of enrolling in the advanced educational program. An improvement in revenue and an increase in jobs has a positive influence on small business sustainability and the overall wellbeing and growth of the surrounding community (Pavlovic et al., 2019). Formal business education and training associated with proven business processes, strategies, and tactics positively impact on entrepreneurial success.

Entrepreneurial education and training for small business owners are a recurring theme in small business sustainability research and can positively influence multiple aspects of starting, operating, and leading a successful small business. Formal education and training can improve an entrepreneur's human capital, confidence, and positively influence the company's growth and sustainability (Heikkilä et al., 2018). Hemazro (2016) conducted a study on small business sustainability and revealed that 70% of his study participants attributed personal and organizational success to a formal entrepreneurial or business education. Formal education positively impacts innovation and creativity for small business sustainability, and those that lack business qualifications should pursue formal education (Hemazro, 2016; Sirilarbanan, 2017; Turner, 2016). Formal education is relevant to the study of small business sustainability as a critical component of entrepreneurial success in creating and operating successful small businesses. Extensive professional experience can accommodate a lack of formal education and can often be considered equal or even more valuable.

Professional Experience

Entrepreneurs start businesses for various reasons, and many small business owners have an interest or experience with the specific industry, product, or service. González and Campbell (2018) concluded in a study about entrepreneurial success strategies that small business owners with sufficient managerial experience were more prepared for decision making. Successful entrepreneurs learn from mistakes, failures, and experiences and have the tenacity and flexibility to adjust and proceed with operations (Hinz, 2017; Sirilarbanan, 2017). In contrast, Boso et al. (2019) concluded in a

quantitative study about small business success factors that an entrepreneur's failure does not positively influence future small business performance without supplemental learning and awareness.

Entrepreneurs often start a business they are passionate about because of experience and knowledge, and this passion a critical component of business sustainability. Yancy and Esteban (2019) explained that experiences influence leader decision making, and small business owners should learn from mistakes to be successful. Successful small business owners align appropriate and educated business decisions with the company's business strategy (Hinz, 2017).

Financial Resources

The acquisition of capital to start and maintain a small business is one of the primary obstacles entrepreneurs face and is a recurring theme in small business sustainability research. Adequate capital to begin and sustain a small business operation is a primary concern for most entrepreneurs because capital is often difficult to acquire (Lukiyanto & Wijayaningtyas, 2020). The owner is responsible for identifying all costs associated with starting the business and sustaining the business through the growth stages, and with identifying ways to secure and retain capital for all costs. Godke Veiga and McCahery (2019) concluded that an entrepreneur's access to external capital is a main barrier to starting small businesses. Business owners have many options to secure funding when and where necessary, and the owners may use internal financing first, followed by credit, and the owners have the option to raise capital by sharing owner

equity (Wong et al., 2018). The main issue owners face is the difficulty in raising money and underestimating the amount needed to sustain the business operations.

Entrepreneurs who do not have an effective business plan can have a hard time securing the capital needed to start their business. A significant problem for small business owners is the lack of an accurate or complete business plan to foresee direction and costs associated with starting and sustaining business operations (Sirilarbanan, 2017). Analysis of monetary resources needed to start and sustain business operation is necessary for business management and is a key aspect of entrepreneurship theory. Eniola (2021) concluded most companies use internally available funds first as working capital, then turn to debt solutions, and then finally offering equity in the company for investment for expansion and development. A business plan is necessary for all funding types to include: (a) bank loans, (b) personal savings, (c) bootstrapping, and (d) crowdfunding.

Bank loans are popular solutions to securing funding when an entrepreneur cannot fund all the necessary start-up and operation costs. Securing funding from a bank in the form of a loan can be difficult for small business owners (Hemazro, 2016). Bank analysts who assess credit and default risk may be averse to lending sufficient cash to small business owners for startup or sustainment (Altman et al., 2020). Small business owners with detailed and complete business plans, along with excellent credit, have less trouble getting enough funding through loan options to start and sustain their business operations (Kunoviku-Demiri et al., 2021).

The utilization of personal savings and bootstrapping to start a business is also a popular way for entrepreneurs to secure funds to start a small business. Bootstrapping is the utilization of monetary resources from friends and family to start a business (Turner, 2016). Family and friends often have an interest in the company or work for the company and are willing to help get operations started if a plan is in place. Entrepreneurs often use personal savings or bootstrapping to fund start-up costs and then secure loans once the operation is established (Turner, 2016). When a business plan is in place, the entrepreneur can have an accurate idea of the monetary resources needed to start and sustain business operations and can save their own resources or use others' support until enough is saved (Turner, 2016).

Crowdfunding is another option, and the platform options and usage have increased substantially since first introduced. Crowdfunding is an open call to investors for providing capital to support a new business venture, and the benefits include ease of use, intention, and effectiveness (Melton et al., 2020). Entrepreneurs create a funding opportunity and post details on crowdfunding digital platforms, allowing potential investors browse the multiple investment opportunities within the crowdfunding platform and choose how and what they want to invest in (Melton et al., 2020). Kickstarter is a popular crowdfunding platform for entrepreneurs and investors and 45 of the 50 most funded projects launched on Kickstarter became ongoing ventures through 2012 (Sahaym et al., 2021).

Crowdfunding platforms allow multiple investors to invest in a portion of the same product or service to hedge risk and permit diversification. Through crowdfunding,

entrepreneurs have unique access to funds that can support profitability, development, and innovation that were difficult to scale before crowdfunding (Pronti & Pagliarino, 2019). Liu and Wang (2018) concluded that crowdfunding investors have deep local knowledge and can provide more accurate demand projections and information to decide whether to launch a product versus venture capitalists with broader demand knowledge. Crowdfunding can also positively impact an entrepreneur's self-efficacy to promote business success (Hoque et al., 2018).

As crowdfunding continues to grow in popularity, more entrepreneurs and others will benefit themselves and their economies. Pronti and Pagliarino (2019) concluded that crowdfunding is a very suitable funding instrument for small and medium sized businesses. Individuals continue to invest in crowdfunding and crowdfunding is a complex phenomenon that continues to evolve with benefits across technology and finance for small businesses (De Luca et al., 2019). Regulation across the world differs regarding crowdfunding, but all governing and regulatory bodies ultimately want to protect both the investor and the borrower (Joshi, 2018).

Crowdfunding platforms continue to transform and positively impact the business environment across the world. Johan and Zhang (2020) concluded that entrepreneurs can benefit from crowdfunding platforms and can significantly impact investor attention if they disclose both qualitative and quantitative information for investor consideration. The development of crowdfunding has dramatically impacted the social aspect of entrepreneurial finance and increased awareness and availability of funds entrepreneurs need to start their business.

Transition

Section 1 contained details about the problems related to IT small business sustainability. The subsections included the background of the problem, the problem statement, the purpose statement, and the nature of the study. Section 1 also included details of the interview process for the qualitative case study with sections for the research question, interview questions, conceptual framework, assumptions, limitations, and delimitations of this research study. The section ended with a review of academic literature related to internal and external factors that can affect small business sustainability.

In Section 2, I restate the purpose statement and describe the role of the researcher, the participants, and research method and design. I then explain the population and sampling of the study, ethical research, data collection instruments and techniques, data organization technique, and analysis of data. Section 2 concludes with a section explaining the reliability and validity of the study.

Section 2: The Project

Small businesses provided 65.9% of the new jobs created between 2000 and 2017 in the U.S. economy (SBA, 2018). In Section 2, I outline the purpose of the study and the methods that were used to conduct the qualitative study of strategies IT small businesses can adopt to sustain operation beyond the first 5 years. Section 2 includes a discussion of the role of the researcher, participants, research method and design, and population and sampling. In this section, I also describe the ethical research practices, data collection instruments and techniques, data organization techniques, data analysis technique, and reliability and validity of the study.

Purpose Statement

The purpose of this qualitative multiple case study was to explore sustainability strategies IT small business owners use to survive the first 5 years of operation. The target population consisted of four small business owners in the IT industry in a southwestern U.S. state with successful experience in using sustainability strategies to survive the first 5 years of operation. The implications for positive social change include the potential to improve business operations for current small business owners and provide insight into successful business strategies for future small business owners to promote sustainability and, thus, create more jobs for a stronger economy.

Role of the Researcher

I was the primary research instrument in this study. My data collection process included selecting qualified participants and gathering information from them as the primary research instrument using semistructured interviews. The role of a qualitative

researcher involves serving as the primary research instrument (Barnham, 2015). In qualitative research, the researcher collects and organizes data, presents findings, and protects the integrity of the research (Patton, 2015). Qualitative researchers design the study, gather data, and present emerging themes (Roller & Lavrakas, 2018).

Qualitative researchers can filter and synthesize interview data to garner extensive details about and understanding of the subject (DuBois et al., 2018; Yin, 2018). I collected and analyzed the data gathered to determine patterns and themes to better understand the strategies used to sustain small business operation beyond the first 5 years.

I have a relationship with the research topic from my work experience and high dependency on IT resources to develop and manage digital products. My professional experience has exposed me to various IT small business operations. I have an interest in the large impact small IT businesses have on society, and the exponential growth of IT support for business operations across all industries. However, I did not have a personal relationship with any of the potential participants.

The Belmont Report is a historical document with guiding principles for ethical research (Miracle, 2016). The moral obligation of the researcher when interacting with interview participants occurs beyond bias, self-awareness, experience, and understanding (Karagiozis, 2018). According to *the Belmont Report on Ethical Principles and Guidelines for the Protection of Human Subjects of Research*, researchers should develop procedures to alleviate any ethical issues and protect the participants' privacy while conducting the study (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979). I followed the ethical principles regarding

respect for persons, beneficence, and justice contained in *the Belmont Report* during the current study when engaging small business owners. Researchers at the U.S. Department of Health and Human Services (1979) explained that respect for persons is the recognition that participants in a study are entitled to their own opinions and decisions, respect for beneficence is the ethical treatment of the participants and protecting them from harm, and respect for justice is the assignment of benefits and burdens of the research.

A researcher with the most systematic study can still encounter personal bias, and people nearest the study have a more difficult time identifying bias (Karagiozis, 2018). Qualitative researchers must confirm that personal bias does not hinder the study (Patton, 2015). Fusch and Ness (2015) postulated that one of the most difficult predicaments qualitative researchers face is sympathizing with and understanding the perspectives of their participants. Beliefs and prior experience can impact data evaluation, and self-reflection can help researchers understand how experience and beliefs can influence a research study (Long & Johnson, 2000).

I remained professional and objective during the interview process to control bias in data gathering and analysis. I used member checking to minimize bias and to help ensure the data were valid in this qualitative case study. Researchers use member checking to get valuable feedback from participants, get participants to validate data, and check the data dependability (Varpio et al., 2017). Researchers using member checking follow up with participants with the researchers' interpretations of the participants' responses to the interview questions to validate the information (Fusch et al., 2017).

Member checking, in combination with other tactics, is a valuable method to help ensure study reliability and validity.

I enhanced data reliability and validity by following an interview protocol to maintain uniformity for each of the semistructured interviews (see Appendix). Qualitative researchers use interview protocols to facilitate consistency and reliability across interviews for their study (Castillo-Montoya, 2016; Yin, 2018). Researchers use an interview protocol to help ensure the same questions and format are followed in the interviews (Yin, 2018). Researchers can help avoid leading questions and bias with an applicable interview protocol (Yin, 2018). The interview protocol should be easy to understand and is a recommended procedure for data collection (Braaten et al., 2020; Yin, 2018). I used an interview protocol to ensure I asked the same questions in the same order to all IT small business owner participants.

Semistructured interviews are a preferred method of collecting data in a qualitative study (Burwell, 2017). I conducted semistructured interviews with an interview protocol and predetermined questions for each participant. The semistructured interviews I conducted consisted of eight interview questions. I encouraged follow-up questions and conversation to clarify responses.

Participants

The participants were IT small business owners who had been in operation for more than 5 years. Participant eligibility criteria are established to define the characteristics the participants should have to effectively answer interview questions and help answer the research question (Hagaman & Wutich, 2017). The eligibility criteria for

participants in the target population was individuals who (a) had owned an IT business in a southwestern U.S. state beyond the first 5 years, (b) had fewer than 200 employees, and (c) were over 18 years old.

I gained access to IT small business owners by networking with personal contacts, using social networks, and researching qualified participants registered with the SBA located in a southwestern U.S. state. Liu (2020) postulated email is a good way to seek and schedule participants, and researchers can have a better response to survey solicitations if the subject line is more detailed to the objective versus generic. I reached out to potential participants via email, social network messaging, and phone calls to introduce myself and determine if they were interested in participating in the study.

When the qualified individual agreed to participate in the study and interview, I scheduled a time to conduct the interview virtually using the video conferencing application, Zoom. The scheduled meeting was sent to the participant using email with a link to the uniquely created Zoom meeting. Hoyland et al. (2015) concluded that continuous negotiations during the study are likely needed to gain close access to the participants to serve the data requirements. I remained in contact and consistently communicated with participants to inform them of the expectations before, during, and after the interview process to retain their interest and support.

I built working relationships with each of the participants by building rapport through all forms of communication. A researcher must build trust and create a relaxed and respectful atmosphere to gather reliable data for the study (Yin, 2018). Researchers need to demonstrate transparency to the participants about the research being performed

to avoid disruptions and maintain a professional and ethical relationship (Esmene & Kirsop-Taylor, 2021; Mauthner, 2019). I communicated timelines and meeting requirements effectively and transparently to honor and respect the participants' time. I ensured participants were comfortable with the process and maintained a professional working relationship to ensure trust was not lost and a respectful and meaningful relationship was built (see Amundsen et al., 2017).

To be considered and invited to participate in this qualitative case study, I confirmed that each participant's characteristics aligned with the overarching research question in the study. Patton (2015) concluded that researchers using the qualitative method rely on interview data from participants with predefined characteristics. Researchers select qualified participants to assist the researcher in answering the overarching research question of the study (Maramwidze-Merrison, 2016). The participants for this study were small business owners who were successful at creating and applying strategies related to business sustainability and continuation.

Research Method and Design

Research Method

I used the qualitative methodology to explore strategies that IT small businesses owners use to sustain operation beyond the first 5 years of operation. Qualitative researchers study participants that have experienced the phenomenon being studied (Palinkas et al., 2015). Researchers use the qualitative research method to answer questions by uncovering the thoughts and actions of a specific group of people (Jonsen et al., 2018). The thoughts of the qualitative study participants are uncovered using focus

groups, interviews, or surveys to uncover themes and patterns (Harrison & Rouse, 2015; van den Berg & Struwig, 2017). Qualitative researchers use methods to develop and explore new insights for the research topic (Balmer & Richards, 2022). Researchers use the quantitative research method to try and prove or disprove a hypothesis using statistical data (Schneider, 2015). Barnham (2015) postulated that quantitative researchers observe the numerical relationships between variables through collected data. Researchers use the mixed-method approach by combining both qualitative and quantitative characteristics to determine relationships and answer problem statements (Timans et al., 2019).

The qualitative research methodology was the most appropriate for this study to explore strategies of sustainability from individuals in existing IT small business ownership roles that have sustained operation beyond the first 5 years. The quantitative research methodology was not a suitable approach because I did not use statistical analysis to classify variables or construct a statistical model of relationships to answer the question of business sustainability. The mixed-method approach was not appropriate for this study because I did not need the quantitative part of this methodology because factors and/or dependent variable numerical data were not measured.

Research Design

After considering multiple qualitative research designs for this study, including case study, ethnography, and phenomenology, I decided on the multiple case study design as most suitable. Researchers use the case study design to explore real-life situations and examples from a subset of a larger group (Heale & Twycross, 2018). Hyett

et al. (2014) described the case study design as offering flexibility in methodology through diverse standards, designs, and methods. Researchers use case studies to understand a phenomenon rather than measure trends (Pathiranage et al., 2020). Marshall and Rossman (2016) concluded that a case study design might be superior to other qualitative research designs because researchers can provide a clearer picture of the research problem. Case study researchers use this design to gain a deeper understanding of a phenomenon by examining authentic situations and develop new ideas and strategies (Harvey, 2015). I used the case study design as a foundation for analysis and triangulation of real business owner experiences to conclude what strategies small business owners use to sustain businesses beyond the first 5 years of operation.

I used a multiple case study design because of the flexibility and ability to conduct methodological triangulation of data collected through semistructured interviews and organizational documentation. Reichow et al. (2018) suggested that a single case study design is less reliable and presents a greater risk of bias. I did not use a single case study because I gathered information from more than one IT small business owner for greater data reliability and to prevent a greater risk of bias possible in a single case study.

Researchers use the ethnographic design by identifying beliefs and feelings of a group through observation or surveillance over a sustained period (Bartholomew & Brown, 2022; Cruz, 2016). The ethnographic design requires the researcher to study participants in their environment to understand their culture and values (Hammersley, 2018). The ethnographic design was not appropriate for the current study because I did not include the daily study and investigation of a group.

Moustakas (1994) concluded that the phenomenological design relates research to ideas and qualities. Vurtec et al. (2021) concluded that the phenomenological research design can be used for an in-depth exploration of experiences. When using the phenomenological design, researchers mainly use interviews of a single participant for the study data (Marshall & Rossman, 2016). The phenomenological design was not suitable for this study because I did not address individual lived experiences as the primary form of collected data to answer the overarching research question. The phenomenological design was also not appropriate because I interviewed multiple IT small business owners to increase data reliability for this study versus only one subject.

Researchers use the process of methodological triangulation by comparing results from various sources to achieve data saturation (Fusch & Ness, 2015; Harvey, 2015). Data saturation is important in case study research to enhance the validity and reliability of the research (Fusch & Ness, 2015). Researchers use data saturation as a concept for estimating sample size in qualitative research, and saturation is achieved when no new information is gathered and patterns in research data begin to repeat (Guest et al., 2020). I asked open-ended questions to four IT small business owners that had sustained business operation beyond the first 5 years. I ensured data saturation was accomplished by interviewing multiple IT small business owners until there was an absence of new data and themes in their responses to interview questions.

Population and Sampling

The population for this qualitative multiple case study included a purposive sample of IT small business owners who met the participant eligibility criteria.

Qualitative researchers use a purposive sample that predetermines the proper group to pool participants from (Saunders et al., 2016). Purposeful sampling gives the researcher control of selecting participants who are knowledgeable and full of relevant information pertaining to the research phenomenon (Iqbal et al., 2017; Patton, 2015). Rutberg and Bouikidis (2018) concluded that qualitative researchers should align the sample population background and characteristics with the research question.

Purposive sampling is the specific selection of study participants that meet objective and research criteria (Campbell et al., 2020). I used a purposive sample of IT small business owners and sent participants consent forms with relevant information about the researcher, the study goals, and ethical standards followed to document their eligibility and reliability for the study. The IT small business owner participants for this study were in operation more than 5 years, employed less than 200 employees, and were in a southwestern U.S. state. I identified and reached out to potential participants through social networking and through public resources and databases provided by state governments.

I selected three IT small business owners who met all selection criteria to participate in this qualitative multiple case study to obtain reliable data and reach data saturation. The sample size should be large enough to achieve data saturation in qualitative research (Hennink & Kaiser, 2022). Fusch and Ness (2015) concluded that researchers determine the sample size with data saturation. Researchers achieve data saturation when no new information or themes arise when interviewing purposively selected participants (Fusch & Ness, 2015). I triangulated data collected from

interviewing participants and reviewing company records available to the public, such as organizational reports and press releases to identify themes. I asked open-ended and follow-up questions to garner relevant information and continue the process until reaching data saturation.

Prior to conducting the interviews, I ensured the participant met all established criteria for this study. Interviewing participants with first-hand experience can increase data reliability and relevance (Harman & Azzam, 2018; Rosenthal, 2016). I used interviews to obtain data from participants in a neutral and comfortable setting and at a comfortable time for the participants. Paine (2015) asserted that interviewees were more likely to provide reliable information and be less distracted when the interview took place in their own environment and during an appropriate time. I provided multiple options to interview candidates when scheduling interviews and honored their preferences to promote a comfortable environment. I was transparent about how long the interviews could take and respected the participants' time and privacy in hopes to entice participants to respond to interview questions honestly and fully.

Ethical Research

Ethics in this qualitative research study was a primary focus to ensure participant privacy and rights protection. I followed the Walden University's Institutional Review Board (IRB) guidelines and gained IRB approval prior to seeking participant consent and conducting the interviews. Researchers are required to practice ethical research by fully disclosing the research topic and purpose with the participants and protecting participant privacy (Morse & Coulehan, 2015).

Researchers should guard the privacy of each research study participant.

Researchers are responsible for protecting participant information and limiting the possibility of infringement (Oye et al., 2016; Tolich & Tumilty, 2020). I protected all participants' personal identities by avoiding the use of their company or personal names. I assigned code names to each participant to ensure confidentiality. *The Belmont Report* outlined a foundation for the ethical and fair treatment of research participants (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979).

I used the guiding principles from *the Belmont Report* in this qualitative research study. I protected and respected participant identity and information by keeping their personal details confidential and secured. Participant confidentiality is necessary to ensure confidence and trust between the researcher and the subject (Hoyland et al., 2015). I stored all interview data on a password-protected cloud storage platform, and I will delete the data after 5 years. All nondigital information is kept in a locked solid-state safe and I will destroy all the documents after 5 years.

Upon receipt of Walden University's IRB approval, I reached out to each participant to introduce myself and the study purpose before scheduling interviews and collecting data. I ensured the participants recognized that their participation was completely voluntary, and they were able to withdraw at any time without penalty. Wolf et al. (2018) described the need for researchers to inform participants that they have the right to refuse to answer questions or withdraw from the study at any time. I informed the participants to call or send an email with their request to withdraw from the study any

time before, during, or after the interview. I also disclosed that there was not any compensation or incentive for participation. Researchers should not encourage or coerce participants by offering incentives or not allowing to refuse questions (Yin, 2018). The Walden University's IRB approval number is 07-21-21-0693609.

Data Collection Instruments

I was the primary data collection instrument as the researcher for this qualitative multiple case study. The researcher is the individual that collects, interprets, and analyzes the data in qualitative research (Cumyn et al., 2018; Karagiozis, 2018; McGannon & Smith, 2015). Yin (2018) concluded that researchers can use a variety of tools and techniques to collect and transcribe interview data to ensure accuracy and reliability.

I used semistructured interviews with open-ended questions and public document analysis to gather and triangulate data. Johannsen et al. (2021) postulated that taking notes can supplement audio recording and assist in documenting and recalling important details. I used the Zoom video conferencing application to virtually interview IT small business owner participants and took notes digitally during the interview. Each interview had an audio and video recording to reference each interview when needed during the data analysis process.

Siegner et al. (2018) postulated that qualitative researchers often use document analysis in research and company document review can add substantial information when applied appropriately for triangulation. I gathered all available and pertinent organizational reports and press releases for each participant's IT small business and

triangulated the data with the interview data to determine what possible strategies the successful small business owners have used to sustain operation beyond the first 5 years.

Researchers produce more reliable and valid data when a comprehensive review of the results is completed (Patton, 2015; Varpio et al., 2017). Researchers use member checking to get valuable feedback from participants, get participant to validate data, and check the data dependability (Varpio et al., 2017). I conducted member checking with participants to establish reliability and validity of the data. Member checking is a vital aspect of qualitative research to enhance data validity and involves a follow up meeting after the interview is completed to review what the researcher captured and ensure the shared experiences were understood and documented correctly (Aldiabat & Le Navenec, 2018; Morse, 2015). I meticulously summarized each interview and conclusion to review with each participant during the member checking process to ensure accuracy and validity.

Data Collection Technique

The primary data collection technique for this qualitative multiple case study was semistructured interviews using open-ended questions. Semistructured face-to-face interviews offer the flexibility to gather first-hand, in-depth, and reliable data around the research phenomenon (Baines et al., 2018; McIntosh & Morse, 2015). Qualitative researchers should consider and ensure data quality and reliability throughout the research process (Castillo-Montoya, 2016).

I followed the interview protocol and used interview and follow-up questions to gather dependable data from each IT small business owner participant (see Appendix).

Qualitative researchers use open-ended questions in a semistructured fashion to better understand a problem (Rutberg & Bouikidis, 2018). I asked additional questions when applicable to clarify any uncertain details and to increase depth and understanding of participant responses. Researchers use semistructured interviews to explore participant views, experiences, and opinions in their own words (Harvey, 2015).

There are advantages and disadvantages associated with any data collection technique (Yin, 2018). Qualitative researchers typically conduct interviews in the participant's natural setting or in another quiet environment that make the participants comfortable to answer questions during the semistructured interview (Rutberg & Bouikidis, 2018). Ranney et al. (2015) explained that participants are more likely to share detailed experiences in a relaxing and comfortable setting. Researchers can use interviews to obtain comprehensive insight directly from the participant (Yin, 2018).

There are also disadvantages of face-to-face interviews that I was aware of in the data collection process. Siedlecki (2022) cautioned researchers about the potential for researchers to drift away from the approved interview questions. I maintained control of the interview and adhered to the interview protocol. Marshall and Rossman (2016) also described face-to-face interviews as being labor intensive and time consuming. I considered the time and effort associated with all aspects of the data collection and analysis processes and planned accordingly to avoid becoming overwhelmed and negatively influencing the study timeline.

The secondary source of data for this qualitative multiple case study was reviewing company documents available to the public. Siegner et al. (2018) postulated

that qualitative researchers often use document analysis in research. I collected and analyzed public documents, such as organizational reports and press releases that aligned with the research question. Researchers can acquire relevant documents from multiple digital sources, such as websites and databases (Yin, 2018). Document analysis can add substantial information when applied appropriately for triangulation in qualitative studies (Siegener et al., 2018).

There are advantages and disadvantages associated with document review as a data source. An advantage to reviewing documents is that the information is always available and does not change (Yin, 2018). Another advantage of reviewing and analyzing documents is the concrete timeframe of the data (Yin, 2018). Some disadvantages of reviewing and analyzing documents are that the documents could include bias depending on who created them, and the documents could leave out details the researcher needs (Yin, 2018). I retrieved documents from multiple digital resources, such as websites and databases, to reduce the risk of suffering from these disadvantages.

I completed member checking during the data collection process of the study to enhance data reliability. Researchers use member checking to increase the validity and reliability of the data collected (Yin, 2018). I reviewed the data collected with each participant to validate the interpretation of the information gathered. Member checking solidifies the information derived from the interviews through summary review with each participant in qualitative research (Marshall & Rossman, 2016). Member checking validates the data captured and confirms that the statements and views are expressed accurately (Birt et al., 2016). I used member checking to validate the accuracy of my

interpretations of the interviewee responses. Each interview was recorded and transcribed and then a follow-up virtual meeting using the Zoom meeting platform was scheduled with each participant. I shared my understanding of each of their responses and solicited feedback and additional clarification when needed.

Data Organization Technique

Data organization and security are important steps in a qualitative case study and allow for easy retrieval of data for analysis. Well organized data allows for simple retrieval of information relevant to the research question for analysis (Manning, 2018). Researchers should appropriately organize and prepare qualitative research data for analysis as a primary step of research (Akinyode, 2018). Qualitative researchers have a variety of software programs and tools for storing and organizing data (André, 2020). Yin (2018) postulated that qualitative researchers should use a case study secure database to store the data obtained from all resources.

The primary software program I used to transcribe and organize data is Microsoft Word. All interview transcripts and research documents were prepared and organized using Microsoft Word for manual analysis. Each interview transcript document included a verbatim account of the interview. I created a separate document for each participant and transcribed each interview by playing back the interview recording and I included all questions and responses that were easily accessible. Each document was organized, labeled, and stored securely using a secure Dropbox cloud storage folder. Cloud-based storage is an effective way to secure data collected (Renner et al., 2018). I referenced

each document to manually analyze the data. After 5 years, I will destroy all records by permanently deleting all related documents from the secure folder.

Data Analysis

I used methodological triangulation for analyzing data from semistructured interviews and company documents. Qualitative researchers analyze data to uncover common themes and patterns to answer the general research question (Ramakrishna, 2018). Researchers employ methodological triangulation by using multiple data collection sources (Abdalla et al., 2018). Researchers use methodological triangulation to cultivate comprehensive data and understanding (Fusch & Ness, 2015; Shea, 2022). I used methodological triangulation to compare the interview responses and company documents to uncover important factors, common themes, and summarize the findings in the form of a conclusion to answer the overarching research question.

Data analysis is a complex process that requires researchers to immerse themselves in the data to discover themes (Yin, 2018). Yin (2018) postulated that researchers analyze qualitative data in five phases to include: (a) compiling data, (b) disassembling data, (c) reassembling data, (d) interpreting data, and (e) generating conclusions. After receiving approval from the Walden IRB, I began collecting data using semistructured interviews and company document analysis.

I compiled data in Microsoft Word documents stored in a secure Dropbox cloud storage folder from the interview data and the analysis of company documents such as financial statements, marketing strategies, and business plans. I used NVivo data analysis software to disassemble all interview and company document data collected and

categorize the data using codes for triangulation. NVivo is a useful tool that enables researchers to organize, analyze, and protect study data (Robins & Eisen, 2017). I reassembled the data using NVivo data analysis software to identify recurring themes from all sources of data.

Once the data was validated by each participant, I used NVivo to assist with the organization and storage of the data to help with data analysis and triangulation. Qualitative researchers can use software such as NVivo to help them organize and interpret data more accurately and rapidly (Dalkin et al., 2021). Researchers can use software such as NVivo to organize and interpret collected data (Yin, 2018). I purchased a subscription to NVivo and used the software to help identify themes and create visuals for analysis. NVivo assisted with creating the codes for the data necessary for analysis and theme identification.

Researchers should describe the way the conclusions from the data were formed based on the recurring themes that emerged from participant perceptions and experiences (Moser & Korstjens, 2018). I provided an interpretation of study findings as they pertain to the conceptual framework and the strategies IT small business owners use to sustain business operation beyond the first 5 years. In conclusion, I (a) summarized the findings, (b) discussed limitations of the study, (c) discussed implications of the study, (d) discussed the need for future research, and (e) discussed any new information discovered during the study.

Reliability and Validity

The quality of this qualitative multiple case study was dependent on reliability and validity. Researchers can produce a well-developed and dependable study when they pay close attention to issues related to validity and reliability (Yin, 2018). Yin (2018) explained that reliability is the researcher's successful and consistent measurement, and alignment to the case study methodology. Research validity is the accuracy and precision of the research data in a qualitative research study (Lawrence, 2015). Qualitative researchers should ensure study quality and validity through confirmability, credibility, dependability, and transferability (Marshall & Rossman, 2016). I ensured reliability and validity during this qualitative multiple case study through methods described in the following sections.

Reliability

Reliability is the enhancement of dependability of the research. Qualitative research reliability is dependent on the ability of the researcher to collect accurate data and the consistency and repeatability of the study (Yazan, 2015). Researchers can establish reliability by conducting a study that others could repeat with similar results (Macphail et al., 2015; Morse, 2015). To enhance dependability, I used an interview protocol and predetermined open-ended interview questions to maintain consistency.

Qualitative researchers use interview protocols to ensure reliability across interviews for their study (Castillo-Montoya, 2016). To enhance the reliability of this study, I also conducted member checking. Member checking is the process of eliciting feedback from participants about researchers' interpretations of participants' answers to

interview questions to verify the accuracy of such interpretations (Birt et al., 2016). After each interview, I compiled and organized interview data and then met with each participant again to discuss my interpretations to validate the data in the form of member checking. Member checking can ensure the accuracy of the triangulated interview and company document information (Madill & Sullivan, 2018).

Validity

Study validity refers to the accuracy of the study data (Long, 2015). Qualitative researchers can ensure study validity when the appropriate methodology is used to gather and analyze the data (Lawrence, 2015). I used semistructured interviews and company document review to gather study data. I performed member checking with interview participants to ensure the way I interpreted responses was accurate and avoided a validity risk. I used methodological triangulation by comparing data from interviews and company documents to increase the validity of this study. Researchers use methodological triangulation as a method for comparing multiple sources of information to support data validity (Fusch et al., 2018). Researchers can focus on credibility, confirmability, and transferability to demonstrate a valid and trustworthy study (Farokhzadian et al., 2015).

Credibility

Presenting a valid research study improves the researcher's credibility and trustworthiness on the research topic. The study participants and readers find the study credible if they feel the research topic and findings are authentic and influential (Noble & Smith, 2015). Credibility can be established through data scrutinization to determine if

the data gathered and analyzed are accurate (Birt et al., 2016). To ensure credibility, I kept the study aligned with the research question, selected appropriate participants, and used applicable data collection methodology.

Fusch and Ness (2015) reinforced that methodological triangulation is a technique used to validate the credibility of a research study. I enhanced the credibility of this qualitative multiple case study by using member checking with each participant. I also used methodological triangulation by comparing data from interviews and company documents such as organizational reports and press releases to discover recurring themes in small business sustainability and help ensure data credibility.

Confirmability

Confirmability refers to the process of involving the study participants in the confirmation and validation of study outcomes (Noble & Smith, 2015). Confirmability is verified when the results are supported by others and avoid any researcher bias (Kallio et al., 2016). I aimed to accurately reflect the participants' views from semistructured interviews. I documented my conclusions and interpretations in detail so that my evaluation can be processed and understood by others. I had follow-up discussions with participants to perform member checking to increase confirmability of the study. I conducted member checking by giving study participants my interpretations of their answers to interview questions and asking participants to verify the accuracy of my interpretations.

Transferability

Transferability is a validity criterion that pertains to the ability for future researchers to use the study findings in their own research and apply the research to other situations with similar context (Moon et al., 2016; Tuval-Mashiach, 2021). Thorough member checking in qualitative research is important for study transferability (Birt et al., 2016). To enhance the transferability of this study, I used member checking to validate all study data gathered from interviews. Researchers also establish transferability by outlining research procedures so that other researchers can imitate the processes and obtain similar results (Maher et al., 2018). I presented the findings clearly and accurately so that other researchers could perform similar processes in their research about what strategies small business owners use to sustain operation beyond the first 5 years.

Transition and Summary

In Section 2, the key topics discussed were the role of the researcher, participants, research method, research design, population and sampling, ethical research, data collection instruments, data collection technique, data organization techniques, data analysis, and reliability and validity of the study. In Section 3, I include an introduction, presentation of the findings, application to professional practice, implications for social change, recommendations for action, recommendations for further research, and personal reflections. I complete Section 3 with a conclusion followed by the appendices.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of this qualitative multiple case study was to explore sustainability strategies IT small business owners use to survive beyond the first 5 years of operation. The study participants consisted of four small business owners in the IT industry. Each small business owner represented a firm focused on growth and innovation that had sustained operation beyond 5 years. Semistructured interviews and a review of company documents were the data collection methods used in this study. I conducted data analysis, used methodological triangulation to synthesize the data from each data source, and performed member checking with each participant. NVivo 11 qualitative software and Yin's (2018) five-step process were used for data analysis, resulting in three key themes: (a) judicious management of financial capital, (b) customer satisfaction, and (c) industry education and experience.

Presentation of the Findings

The central research question that guided this study was: What sustainability strategies do IT small business owners use to survive the first 5 years of operation? Semistructured interviews consisting of eight open-ended questions and the review of both company and public documents served as the data collection methods for exploring the sustainability strategies that successful IT small business owners use in the southwestern U.S. The four participants were IT small business owners with fewer than 500 employees that had been in operation beyond 5 years. I used Yin's (2018) five-step process of qualitative data analysis, which included (a) compiling, (b) disassembling, (c)

reassembling, (d) interpreting, and (e) concluding the data. I documented, organized, and analyzed data collected from the participants using NVivo software to discover themes and patterns associated with strategies to sustain business operation beyond 5 years.

Maintaining the participants' confidentiality is a key role of a researcher. I assigned each participant a unique identifier (i.e., P1-P4) to ensure the participants' confidentiality throughout the research process. Qualitative researchers also need to mitigate against bias in their research. I used an interview protocol and conducted member checking to mitigate bias during the data collection processes. I verified each participant's responses and ensured accurate and appropriate assessment for analysis.

I studied vital strategies IT small business owners adopt to sustain operation beyond 5 years through the lens of the conceptual framework of the entrepreneurial theory and maintained focus on the research question during the data collection and analysis processes. The three major themes found were (a) judicious management of financial capital, (b) customer satisfaction, and (c) industry education and experience. These three major themes discovered relate to the entrepreneurial theory because the themes all impact the competitiveness and success of the small business.

Theme 1: Judicious Management of Financial Capital

The judicious management of financial capital is a critical aspect of starting and sustaining a successful small business and was the most predominant theme that emerged from the study. Financial capital availability and management are essential aspects of maintaining a competitive advantage and business success for entrepreneurs (Gardner, 2019). Entrepreneurs can access capital from many sources, but acquiring capital to start

a business can be difficult and is a primary concern for most small business owners (Lukiyanto & Wijayaningtyas, 2020). All four participants referenced judicious management of financial capital as a critical aspect of small business sustainability beyond 5 years.

P1 described that financial strategy and planning was the most crucial aspect of starting and sustaining a small business. P1 shared that they had quit a full-time job to create an IT small business, and knowing there would not be a flood of business initially, it was essential to keep costs low and have a safety net. P1 kept starting costs down by working from a home office and by using hardware and software already purchased from prior professional career. P1 explained that their spouse was employed full time, which provided them with initial capital to start the business, health insurance benefits, and a steady income as a safety net. P1 said, “there was still a lot of risks. I was giving up a regular full-time paying job, losing all that income, but I was not starting with nothing because I had a partner to sustain me during all those years.” P1 explained that it took approximately 4 years to accumulate enough work equivalent to a full-time job, stating, “it took 4 years to have enough work and enough clients to keep me busy all day every day.” P1 relied on the financial support of their spouse to start and maintain the business beyond 5 years, explaining that their spouse’s steady income was able to support their family and IT small business in its infancy phase. P1 shared that they created capital as the business grew by selling part of the business in a merger. P1 said, “I actually sold half of my business and then took my business and added it to his business, so we had a combined company, and we were equal partners.” The merger transaction provided P1

with additional capital and expanded their customer portfolio. P1 also shared business and financial plans associated with the start of their IT small business. The business financial plan documents outlined the necessary resources and supplies required to start the business. The documents supported collected interview data from P1 (e.g., the vital importance of controlled spending during the first 5 years). In addition, the documents showed the funds to launch the business were sourced from personal savings. I used these documents to triangulate the data and validate the judicious management of financial capital theme.

P2 also described financial capital as a key aspect of starting and sustaining business operation beyond 5 years. P2 detailed the startup costs associated with their IT small business to include equipment, training, and marketing. P2 also provided business plan documents showing personal financial contributions to the business. The company origination documents showed the structure of the business, necessary tools needed to begin operation, and the cost associated with acquiring those tools. I triangulated interview and company document data to support the study theme of judicious management of financial capital. P2 explained that personal savings funded startup costs but they had to quickly accelerate to a recurring revenue stream to sustain the business as it grew, and this was often a struggle. P2 said, "I wanted to keep the lights on and keep the employees happy and make payroll, so a recurring and steady revenue stream was necessary." P2 advised there were various services that the small IT business provided, and they had to adapt to customer needs to maintain consistent revenue streams, such as website design and maintenance. The success of the IT small business steered the

expansion of personnel and equipment, which led to the eventual use of bank loans and lines of credit to fund necessary costs. P2 said, “bank loans were not an option as I started the business, but when we were able to document and prove successful with a couple of years of tax returns, banks were willing to lend the money needed for expansion.” P2’s statement about small business lending requirements supports the theory that small business owners are limited to external funding options with limited internal capital (see Horvatinović & Orsag, 2018).

P3 described that the need to keep the costs low to maintain financial capital was the most important strategy for an entrepreneur to use to sustain IT small business operation beyond 5 years. P3 used personal financial means to fund the small IT business and prioritized financial strategy to maintain operation until it was self-sufficient. P3 said, “you need to keep costs down when you start out as a company because you get excited the first 2 years and the costs go up when you hire too many people and have too many obligations.” P3 stated that many IT small businesses fail because they extend their operation too quickly and could not maintain capital commitments. P3 concluded that keeping operations as simple as possible for the first few years can help keep costs low and minimize financial capital needs to sustain business operations. I referenced company financial documents and found that P3’s business expenses were lowest in the first year and trended higher each of the first 5 years of operation. The costs for business continuation activities increased incrementally over the first 5 years and the quantity of expense categories also increased over time. I used company financial statements and

interview responses to triangulate the data linked to the theme of judicious management of financial capital.

P4 started their company out of an opportunity presented by an employer that needed to outsource their IT department. P4 had extensive experience with the employer's systems and took advantage of the opportunity when the company dissolved. P4 described that most IT small businesses survive on referrals for the first couple of years as their businesses grow, and their business was no different. P4 used personal finances and existing equipment to start the IT small business to support the first customers. P4 explained that their spouse had a full-time job that helped the small business and their daily lives until P4 had enough work to support the operation and expand. P4 said, "I wouldn't have been able to embark on this had my spouse not had a good job, and that is how a lot of IT small businesses start." As a small business owner, P4 explained that both P4 and their spouse managed their finances efficiently and did not live beyond their means. This strategy allowed P4 to focus on growing the business effectively with the support from their spouse. P4 shared the business plan, financial documents, and client list documents from the IT small business. P4's personal investment to start the company was detailed in the business plan. Business expenses grew over the first 5 years at a comparable pace to revenue. All company and public documents were a data source to achieve triangulation for the theme of judicious management of financial capital.

All the participants in this study used their personal finances and resources to start their IT small business and referenced judicious management of financial capital as a

crucial part of sustaining operation. Many small business owners use internal funding sources, such as family loans or personal capital, to start businesses versus acquiring external funds from financial institutions (Sarkar et al., 2018). The strategy of each IT small business owner in this study supports the seminal work of Liu et al. (2017) who stated that a common approach for funding a new small business was to invest personal capital. Access to external capital for a new small business is often difficult to acquire (Lukiyanto & Wijayaningtyas, 2020). The strategies that the participants in this study used to manage their finances and balance their personal needs with their business' needs align with the work of Wong et al. (2018), who found that entrepreneurs with conservative internal funding strategies for small businesses can manage and control cash and obligations more efficiently. Financial management strategies are essential for small business owners to optimize resources for operational efficiency to sustain operation (Alexandru & Matei, 2018).

Judicious management of financial capital is an aspect of small business ownership that supports the strategies of the entrepreneurial theory and is a dominant theme across small business literature. Schumpeter (1942) suggested that resource management is an essential strategy for entrepreneurial success. The entrepreneurial theory can provide a lens through which to explore necessary small business owner skills and strategies used to sustain operation (Kurczewska et al., 2020). Schumpeter created the entrepreneurship theory, theorizing that the economic evolution shapes societies and effective resource allocation can positively influence the business and the competitive environment (Audretsch, 2015). The conceptual framework aligns with the judicious

management of financial capital theme discovered in this study because financial resources are a key component of the entrepreneurship theory and enhances the idea that successful small business owners effectively acquire and manage financial resources.

A small business owner may increase operational sustainability beyond 5 years by adhering to a safe and conservative financial strategy. By analyzing data from each participant, I concluded that each participant in this study was cognizant of the importance of judicious management of financial capital to sustain business operation beyond 5 years. Effective financial management could be a strategy other small business owners can adopt to support the business operations.

Theme 2: Customer Satisfaction

The second IT small business sustainability strategy theme that emerged from the data analysis in this study was customer satisfaction. Customer satisfaction is a key finding of small business sustainability research and component of the entrepreneurial theory. Small business owners with superior customer service create higher value and customer loyalty (Eresia-Eke et al., 2019). Small business owners should implement customer satisfaction strategies to ensure the production of quality products and the delivery of excellent services to develop brand loyalty (Satti et al., 2020).

P1 described customer satisfaction as an important strategy for maintaining customer loyalty and repeat business. They established minimum standards of operation and quality control measures for their employees to ensure customers were satisfied with the IT services. P1 said, “standardization and quality control are important because you know your clients will leave you or they won’t accept your technician if they do things

wrong.” P1’s IT small business relies on highly qualified referrals to grow the business; therefore, the quality of work and customer satisfaction are key components of retaining business and increasing customers. P1 said, “I took advantage of a referral model, and you know you give the new client a reward, you give the old client a reward, and everybody is happy.” A key component of P1’s company mission statement is the dedication to customer service, as evident from company documents. P1’s company documents showed that P1 socializes and markets the organization’s commitment to customer service, and I used this document information to achieve triangulation for the customer satisfaction theme.

P2 explained that product or service quality is a key aspect of setting their business apart from competitors. P2’s small business employees had a lot of enthusiasm and open creativity in the first 5 years, which led to the provision of high-quality services. The organization quickly gained respect in the industry. P2 said, “we had four or five people that were really good in their area of expertise, and we weaved that together to support our customers.” P2 established a group of employees empowered to work together very well to solve the many IT problems their customers faced. P2 explained, “that was really our strategy to be the best, to be very good, to make sure that our clients knew we were very good and liked what we did.” P2 relied heavily on referrals from existing clients and joined local committees to grow the IT small business. P2 did not invest money into marketing the company; therefore, they were dependent on the quality of service to drive referrals. P2 said, “we didn’t have marketing, so we relied on word-of-mouth, so we treat them right and do a good job.” Company marketing

documents were used to triangulate customer satisfaction data and showed P2's emphasis on customer satisfaction through the inclusion of customer testimonials. P2 prominently highlighted various authentic service testimonial quotes from previous satisfied customers.

P4 explained that their organization has a customer satisfaction strategy that has been key to sustaining the IT small business beyond 5 years. P4 focuses on service to retain existing customers, saying, "what we implemented was the service first mentality because we learned along the way that customer retention is more important and cheaper than customer acquisition." Galvão et al. (2018) concluded that small business owners should focus on providing superior customer service across all aspects of operations. P4 described that the relationship between client growth and operational growth was directly related to customer service by stating, "if you can keep your clients and help them grow, then we grow with them, so service is a key aspect of maintaining a successful business." P4's business relied heavily on business referrals as they grew, and maintaining a high customer satisfaction expectation provided an avenue for acquiring new clients. I used company documents to achieve triangulation for the customer satisfaction theme. P4 portrays their business as having an award-winning customer service reputation in marketing documents. P4 clearly promotes multiple community and industry awards related to customer service in multiple marketing documents and tactics.

Customer satisfaction is a vital component of the academic literature surrounding small business sustainability and was a key theme in the current study. Entrepreneurs must focus on customer satisfaction to optimize customer loyalty to sustain operation

(Versockiy, 2019). Customer service was a key component of sustainability for three of the four participants. The customer satisfaction theme aligns with the work of Hapsari et al. (2021) who concluded that customer satisfaction is the foundation of customer loyalty. Sheth et al. (2020) concluded that a high degree of customer satisfaction could influence a company's competitive advantage. If a company cannot provide good service, the failure can impact client confidence and loyalty (Iglesias et al., 2020).

Three of the four participants described customer satisfaction as a key IT small business sustainability strategy. These participants endorsed customer satisfaction as a key component to sustaining their business operation beyond 5 years. The theme of customer satisfaction directly relates to the study's conceptual framework. Schumpeter (1942) attributed customer service as a key component of entrepreneurial theory and an essential aspect of small business sustainability to ensure growth and establish a competitive advantage. Small businesses that focus on customer satisfaction can establish a competitive advantage and profitability to sustain operations (Panno, 2020). Small business owners concentrate on customer service strategies have loyal customers and create a favorable financial situation (Eklof et al., 2018; Lachiewicz et al., 2018).

Theme 3: Industry Education and Experience

The final theme from this study was the positive impact of industry education and experience on the sustainability of IT small businesses. All participants shared details about their professional and educational backgrounds. The IT industry is frequently changing, and IT small business owners and their employees must keep up with trends and changes through continuous learning and education. Kurczewska et al. (2020)

postulated that small business owners with greater education and experience could think critically and solve problems quickly to sustain the business operations.

I used the background information provided by each participant during the interview and member checking process to uncover the theme of industry education and experience. Each participant received formal education and continued IT training after high school, and I gained access to participant resumes to validate their educational and professional background. Chankseliani and Wells (2019) concluded that proper education and experience of a small business owner positively impact competitive advantage and improve chances of survival.

P1 described the IT industry as fluid, and P1 must remain agile in the constantly changing IT environment to sustain business operation. P1 holds a master's degree in IT and many IT related certifications. P1 stated, "The IT industry is always changing. The industry requires me to continually update tangible and intangible assets to include my knowledge of industry changes to make sure we do a good job." P1 prioritizes keeping up with industry trends, takes continuing education courses, and updates certifications regularly to ensure P1 remains competitive and continues to innovate. P1 explained that past education and experience allow P1 to effectively serve evolving customer needs and train employees to perform at a high level.

P2 shared that they went to college after high school and majored in IT. When P2 started the IT small business, P2 acknowledged the need to continue higher education and quickly learned from organizational experiences to manage business operations effectively. P2 said, "just because you are a really good coder, or you are a really good

website developer, does not mean that you can be a really good business owner.” P2 had to supplement the formal IT education with business experience, mentorships, and education to effectively establish a sustainable business strategy with short-term and long-term goals. P2 explained, “I had a small business mentor and learned how to manage and to run a business and to ask tough questions and make those tough calls to operate effectively.” P2 emphasized that a combination of industry skills and business skills supported the sustainability of the IT small business beyond 5 years.

P3 received an undergraduate degree in IT and holds various IT certifications. P3 depicted the IT industry as ever evolving and explained that IT small business owners must learn every day to keep up with competitors and sustain the operation. P3 shared, “every day something new comes up, and you have to have the technical expertise and have that flare to want to continuously learn.” P3 described many cost-effective tools and resources available in an open-source format for IT small business owners and their employees to absorb the most relevant and current industry information and changes. P3 stated, “there are cost-effective resources where you can take a course on how to implement a simple website hosting on AWS for only \$11.00.” P3 explained that they are always learning in formal environments and continuously reading to make sure they are keeping up with industry trends from news, announcements, and conferences to prepare for change and to prioritize work.

P4 explained that the IT industry continues to grow and change more rapidly every day. P4 has a master’s degree in IT and several IT certifications. P4 realized that the IT industry was growing and becoming more demanding, so they joined a co-op of IT

industry leaders that share clients and resources to expand availability, capacity, and reliability quickly. P4 was able to keep costs low and target much larger clients through the co-op. P4 said:

My company was limited to the amount of knowledge, whether technical, sales, or anything else, and joining the co-op, all of a sudden, I am part of a group of 150 business owners and having access to their knowledge and capabilities.

P4 explained that if they encountered a problem and did not know how to fix it, P4 could reach the group, and someone would help the company take care of the problem. P4 explained there was revenue sharing, but P4 did not mind because of the increased benefits they received as a small business owner and the size of the clients P4 was now able to secure.

Researchers of small business sustainability exhibit that industry and business knowledge from various resources can positively influence the sustainability of a small business. Business environments are always changing, and new knowledge and skills are needed to maintain competitiveness (Klepić, 2021). Education and training in business principles can promote the success of a small business and help entrepreneurs adapt and overcome limitations (Liguori et al., 2019). Small business owners with higher education and extensive business knowledge sustain business operations more effectively (Porfírio et al., 2020).

Literature shows that education and training are valuable aspects of small businesses that should integrate into small business strategies to sustain operation. All participants in this study identified education and training as an essential contributor to

sustaining business operation beyond 5 years. Education and training can influence business operation and success. According to this qualitative multiple case study, education and training in the IT industry propelled small business operations and contributed to sustaining business operation beyond 5 years.

Entrepreneurs need specific knowledge to start a business and can effectively influence sustainability by continuing to learn and grow as the company does. Education and experience strategies are key components of the entrepreneurial theory. Schumpeter (1942) described an entrepreneur as opportunistic with the ability to overcome obstacles to include knowledge barriers. Kurczewska et al. (2020) used the entrepreneurship theory in their study of small business success factors. Kurczewska et al. concluded that a higher level of education improves problem-solving skills and critical thinking abilities needed to maintain a successful small business. Education and training can affect a company's competitive advantage and influence business sustainability beyond 5 years (Yang, 2016). Education and training positively influence small business sustainability and can impact competitive advantage in the economy.

Applications to Professional Practice

My goal was to identify specific sustainability strategies IT small business owners use to survive the first 5 years of operation. This study's results could help current and future IT small business owners identify and adopt strategies that other entrepreneurs in the same industry have implemented to survive the first 5 years of operation. The strategies that IT small business owners use to sustain business operation may be integrated into other IT small businesses to help with sustainability. The three themes

from this study could influence the professional practice of IT small business owners and their positive impact on their communities.

Judicious management of financial capital was a theme that emerged from this study and each participant aligned to the importance of financial capital management strategies to sustain small business operation beyond 5 years. There are multiple internal and external methods to fund small businesses, and IT small business owners should keep costs low, and operations simple as the company matures during the first 5 years. The judicious management of financial capital strategies from this study can inform small business owners of the financial capital planning and management strategies to start and maintain their small business.

This study's theme of customer service strategies permitted me to suggest that the IT small business owners' customer service practices can impact the survivability of the business beyond 5 years. Customer service integrated into the professional practices of IT small businesses can expand the customer base and improve customer retention. The customer service finding can help IT small business owners implement strategies to ensure quality controls are present for the work performed and appropriate action is taken to address member feedback.

Study findings highlight the importance of knowledge and experience to support operational effectiveness and sustainability. Education and training findings can help IT small business owners understand the importance of industry and business knowledge. IT small business owners should continue to learn and grow in the industry to maintain

sustainability. IT small business owners can apply these strategies in professional practice to sustain business operation beyond 5 years.

Implications for Social Change

This study's findings regarding successful strategies for sustainability could be used by IT small businesses to examine and support their operational sustainability beyond 5 years. Between 1994 and 2018, only 49% of small businesses survived beyond the first 5 years of operation (SBA, 2020a). IT small business owners are operating in a highly competitive environment that is constantly evolving to enhance the efficiency of humanity. Small businesses improve the economy through valuable competition and innovation (Laage-Hellman et al., 2018). IT small businesses can adopt the themes from this study to sustain operation beyond 5 years and thus promote economic growth and stability in their communities.

Greater small business sustainability could contribute to positive social change through job creation and an improved poverty rate in the local community. The sustainability of small businesses promotes expansion and continuous improvement. As businesses grow, mature, and succeed; societies around them prosper through increased tax payments and community engagement. The implications for positive social change of improving small business sustainability impact future entrepreneurs and the communities around them for a better standard of living.

Small businesses are the foundation of a prosperous economy. The economy's health is often measured by the number of successfully running small businesses in the community (Neagu, 2016). According to the SBA (2020a), 65% of new jobs created in

the United States throughout the 21st century were from small businesses. Integrating the findings from this study into existing and future IT small business operations may boost the probability of success and positively impact the number of available jobs and overall standard of living in the surrounding community.

Recommendations for Action

The key themes identified in this study of judicious management of financial resources, customer service, and industry education and experience were concepts adopted by the study participants to sustain operation beyond 5 years and are consistent with the entrepreneurship theory strategies. Entrepreneurs face various challenges and must maintain focus to effectively manage various business functions, such as managing resources, adapting to change, and maintaining a competitive advantage (Schumpeter, 1942). Small business owners can use entrepreneurship theory as a lens to implement key strategies to support competitive advantage and profitability (Kurczewska et al., 2020). I have three recommendations that can aid current and future IT small business owners to sustain business operation beyond 5 years that include the following: (a) manage expenses efficiently, (b) maintain service quality, and (c) stay current on industry trends and changes.

The first recommendation is to manage expenses efficiently to keep costs low during the first 5 years to sustain operation. Each participant expressed the need to manage financial resources efficiently during the first 5 years as the business grows. If expenses grow faster than positive cash flow to support sales growth, small businesses can fail. Small business owners should be patient as their business grows and ensure they

do not use invested capital on unnecessary expenses or initiatives that do not add value. IT small business owners should establish a business strategy that includes financial resource management in the first 5 years of operation to include investment in only the most necessary tangible and intangible assets to operate the business efficiently and keep costs low. Effective expense management can support the growth of the small business and help sustain business operation beyond 5 years.

The second recommendation for IT small business owners is to maintain a high level of service quality. High-quality service promotes customer satisfaction, a higher rate of repeat customers, and encourages referral business. The participants in this study rely heavily on referral business. If clients are not completely satisfied with their services, they are not likely to refer their services to companies in need of similar services. Furthermore, if the client is not happy with the services provided, they are not expected to continue using their ongoing services or contact the small business for future needs. Hyken (2020) concluded that 96% of customers that experience poor customer service would discontinue using a company's services. Quality controls measures, such as responding to and soliciting customer feedback, should be a prioritized process to manage service quality. Consistent levels of service quality through controls can create lasting client relationships that can support sustaining the IT business operation beyond 5 years.

The final recommendation is for IT small business owners to stay current on IT industry trends and shifts to sustain business operation beyond 5 years. All participants expressed that they operate in a fluid industry that is constantly evolving and must

continue to educate themselves and their employees to adjust to technological advances and consumer needs. I recommend creating a continued education plan that includes the monitorization and action of technology trends through the various virtual learning platforms available to IT professionals. IT small business owners should adopt a routine of continuing their IT professional education to build their credentials and maintain industry knowledge. In addition, I recommend IT small business owners seek out business operational knowledge as a resource for starting and sustaining a successful business to sustain business operation beyond 5 years.

In this study, I provided strategies IT small business owners can adopt to maintain competitiveness and profitability to positively impact the communities around them. I recommend that current and future IT small business owners review the findings from this multiple case study to consider my recommendations. Implementing these recommendations can impact the likelihood of success beyond 5 years. This study contained perceptions from IT small business owners who have successfully operated their IT business beyond 5 years, which can positively impact other IT small business owners who adopt the triangulated insights. I will disseminate the results of this study to interested business professionals through conference and seminar presentations and through publishing this study in business journals.

Recommendations for Further Research

The purpose of this qualitative multiple case study was to explore the strategies IT small business owners use to sustain business operation beyond 5 years. I assembled recommendations for action using data collected from four IT small business owners in

the southwestern U.S. that have sustained an IT small business for longer than 5 years. I recommend further research for each of the three themes from this study to dissect each topic and determine what common aspects of each theme positively impact the sustainability of an IT small business.

One limitation identified for this study was the population size of the IT small business owners. I recommend follow-up studies be conducted to corroborate the impactful findings and confirm the transferability of this study. Researchers should do further analysis with a larger sample size to complement the findings of this study.

Another limitation of this study was the geographic areas of the participants. I recommend that other researchers explore strategies IT small business owners in different geographical locations use to sustain business operation beyond 5 years. Future research exploring strategies IT small business owners use in other geographical locations can provide enhanced knowledge for IT small business owners and enable researchers to analyze the similarities and differences of sustainability strategies between locations.

Reflections

My journey through the Walden University's Doctor of Business Administration (DBA) program was challenging and volatile but, in the end, extremely rewarding. I commenced on this journey as a life-long learner with the rare opportunity to accomplish something extraordinary with the incredible financial support of my employer. It excites me to know that I have realized a dream of reaching the highest level of education to set a vital example to my children, family, and peers. The COVID-19 pandemic that emerged during the last 2 years of the journey was an uncontrollable external element that required

perseverance, flexibility, and timeline adjustments. Many small businesses struggled as the world adjusted to a new normal, but as the journey concludes, the world slowly gets back to a new normal.

Reflecting on the ample time I have spent completing DBA courses and fulfilling the doctoral study requirements, I have a greater understanding of the research methods and processes used by researchers. I have more excellent knowledge of the tools and resources available to researchers and the importance of peer-reviewed resources to support my research background. In addition, I have more awareness of researcher bias, the way it could negatively impact a research study, and the way to mitigate this bias for improved data validity. As I continue to expand the breadth and depth of my career, the knowledge I acquired during the Walden University's DBA program will impact my personal brand and enhance my capacity to influence positive social change.

Conclusion

In this qualitative multiple case study, I explored the sustainability strategies IT small businesses use to sustain operation beyond 5 years. IT small business owners must overcome various challenges to create or maintain a competitive advantage and realize profitable long-term success. IT industry small business owners provide products and services that are crucial infrastructure to our daily lives. I pursued this qualitative multiple case study to discover specific IT small business themes to help current and future IT small business owners succeed. I conducted semistructured interviews and reviewed company and public documents of four IT small business owners. I triangulated the data to identify themes.

The three themes of this study were (a) judicious management of financial capital, (b) customer satisfaction, and (c) industry education and experience. I used the entrepreneurship theory as a lens to discover relevant themes that can potentially fill gaps in the small business sustainability literature to support current and future IT small businesses. I corroborated previous small business sustainability research with the identification of three core strategies IT small businesses owners need to sustain operation beyond 5 years. Lauckner (2020) concluded that small businesses employ around 59 million people in the United States, and over 50% of those businesses do not survive beyond 5 years. Improving the IT small business owner survivability metrics can impact not only their own business and career success, but also impact the achievement and sustainment of the economies around them.

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Appendix: Interview Protocol

Interview Protocol

- A. Introduce myself to the participant and thank them for their participation
- B. Remind the participant of the background and purpose of the study.
- C. Time allotted for the interview is one hour for all scripted and follow-up questions.
- D. Provide a copy of the informed consent form and ensure there are no questions or concerns before starting the interview.
- E. Start recording the interview.
- F. Maintain confidentiality by using participant identification code and state the date and time of the interview.
- G. Confirm the participant has reviewed and signed the informed consent form.
- H. Begin the interview questions.
- I. Ask appropriate probing questions when appropriate during the interview.
- J. Conclude the interview and discuss next steps for follow-up and member checking.
- K. Thank the participant for their time and participation and end recording.
- L. End protocol.