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International Expansion Strategies for Small Businesses

May Alkhudari
Walden University

Walden University

College of Management and Technology

This is to certify that the doctoral study by

May Alkhudari

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Review Committee
Dr. Isabel Wan, Committee Chairperson, Doctor of Business Administration Faculty

Dr. Michael Lavelle, Committee Member, Doctor of Business Administration Faculty

Dr. Kim Critchlow, University Reviewer, Doctor of Business Administration Faculty

Chief Academic Officer and Provost
Sue Subocz, Ph.D.

Walden University
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Abstract

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May Alkhudari

MBA, University of Dallas, 2005

BS, Jordan University of Science and Technology, 1998

Doctoral Study Submitted in Partial Fulfillment

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Abstract

Small businesses in the United States struggle to globalize and compete in a globalized economy, which diminishes their growth and investment opportunities. Small business owners in the United States struggle to expand their business globally due to the lack of information, which limits their profitability. Grounded in Porter's five forces theory, the purpose of this qualitative multiple case study was to explore small retail business owners' strategies to improve their profitability opportunities through global expansion. The participants were five small retail business owners in the Northeast region of the United States who successfully expanded their business internationally. Data were collected through semi-structured interviews and a review of public organizations' documents. Through thematic analysis, four themes were identified: (a) strategic positioning, (b) value creation, (c) social networks, and (d) digital platforms. A key recommendation is for small retail business owners to employ the following strategies: a) perform regional market research analysis on the target expansion location, (b) use digital platforms, (c) add value to offerings, and (d) keep in touch with clients, suppliers, marketplaces, and influencers. The implications for positive social change include the potential to help small businesses succeed, which can reduce poverty, increase labor rights, and improve living standards.

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Dedication

I dedicate this doctoral study to my parents, Dr. Mohammad Alkhudari & Wijdan Al-Shanti, for being my heroes, motivators, and inspirers to chase my big dreams with commitment and work on continuous development and growth. I also dedicate this study to my husband, Dr. Gasan Elkhodari, and my kids, Layan Elkhodari, Jana Elkhodari, and Esam Elkhodari, for supporting me during my education journey and making me a proud mother and wife of this amazing family. I urge my kids to stay positive, love knowledge, endeavor for excellence, and believe in themselves. I am praying for your success and happiness all the time.

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Section 1: Foundation of the Study

Small businesses in the United States impact economic, social, and political development. Helping small businesses succeed reduces unemployment, increases the government's income taxes, and promotes positive social changes (Small Business Administration (SBA), 2018). Small business owners need growth strategies to expand their businesses internationally (SBA, 2019). However, small business owners struggle to grow globally (SBA, 2019), so there is a need to solve this applied business problem for small business owners to survive. In this section, I describe the background of the problem and the study's purpose, nature, and significance. I include the research and interview questions, conceptual framework, and academic literature. I also list the study's assumptions, limitations, and delimitations.

Background of the Problem

The role of small businesses in the United States is vital for communities and governments. According to Hanaysha (2018), the retail sector employs close to 30% of Americans. Small businesses account for approximately 99.6% of employers in New Jersey (Small Business Administration (SBA), 2018). Rolleri et al. (2016) stated that small business impacts affect a country’s economic, social, and political development. Helping small businesses reach success is the government's primary goal to reduce unemployment, increase the government’s income taxes, and promote positive social changes (Small Business Administration (SBA), 2018). The globalization phenomenon of world markets is accelerating. Not all enterprises are ready for global expansion, which limits them from the potential rewards of participating in international markets (Bose, 2016). Globalization has increased the competition and challenges among small businesses, which increased the need for implementing efficient strategies to remain active in the market and face the challenges of the business environment.

Firms that do not engage in international business yield worse performance measures than those conducting cross-border operations. Small business owners need growth strategies to expand their businesses internationally (Small Business Administration (SBA), 2019). Small business owners must have the passion and strategy to compete efficiently and remain active in the market (Achtenhagen et al., 2017). However, small business owners struggle to grow globally (Small Business Administration (SBA), 2019), so there is a need to solve this applied business problem for small business owners to survive. Few researchers have explored internationalization strategies that small business owners use to overcome international expansion challenges and embark on global trade (Mohsin, 2020). In this case study, I explored internationalization strategies that small business owners use to expand internationally. The study results included participants' insights that provide community transformation strategies and bring sustainable social change.

Problem Statement

Small businesses in the United States struggle to globalize and compete in a globalized economy, which diminishes their growth and investment opportunities (Small Business Administration (SBA), 2019). Fifty percent of small business owners in the United States struggle to expand their business globally due to the lack of information, which limits their profitability (SBA, 2016, p.1, Figure 3). The general business problem is that small business owners lose growth opportunities and potential income increments without proper international expansion strategies. The specific business problem is that some small retail business owners in the United States lack strategies to improve their profitability opportunities through global expansion.

Purpose Statement

The purpose of this qualitative multiple qualitative case study was to explore the strategies that small retail business owners use to improve their profitability opportunities through global expansion. The target population comprises included five small retail business owners in the Northeast region of the United States who have successfully implemented strategies to improve profitability through global expansion. The implications for positive social change include the potential to identify the strategies that facilitate the integration of the small retail business into the international market and develop the small business sector. The global expansion of small businesses can enable societies to purchase cheaper goods, increase trade, and enhance international economic participation. The success of small businesses can lead to economic growth and poverty alleviation, enabling more significant community development by increasing tax revenues.

Nature of the Study

Research methods include qualitative, quantitative, and mixed methods (Leppink, 2017). I selected the qualitative method. According to Denzin and Lincoln (2011), the qualitative method is appropriate when the problem requires more than a “yes or no” from testing a statistical hypothesis, a large sample is not available, and addressing the research question requires common themes from the data. Qualitative scholars focus on gathering and analyzing nonstatistical data to interpret meanings and understand social life through the targeted populations (Yazan, 2015), which was my intent in this study. Quantitative researchers perform statistical data analysis to test the hypothesis for variables' characteristics, relationships, or differences (Snelson, 2016). The quantitative approach was inappropriate for my research because the research did not involve collecting and drawing conclusions based on hypothesis testing about variables' characteristics or relationships. Because the mixed method requires using both qualitative and quantitative methods, and the quantitative method did not apply to the study, the mixed method was not appropriate.

Principal qualitative designs include case studies, ethnography, narrative, and phenomenology (Liu, 2016). A multiple case study is an appropriate research design for this study because it supports an in-depth exploration of the strategies that small business owners of interest use to expand their businesses. Defining global expansion strategies for small retail businesses involves analyzing and synthesizing the similarities, differences, and patterns across two or more cases, as in a multiple case study (Cacheche et al., 2015). An ethnographic design is used to focus on observing the participants' culture in the fieldwork (Mannay & Morgan, 2015), which was not the purpose of this study. The narrative design is used to analyze content from various sources, such as interviews of respondents, observations from the field, or surveys. The narrative design is used to focus on using people's personal stories and experiences to answer the research questions (Godden, 2017). The narrative design was inappropriate for this study because I did not study individuals' life experiences by collecting their personal life stories. The phenomenological design involves a group of individuals who have first-hand knowledge of an event, situation, or experience (Padilla-Díaz, 2015). Phenomenological researchers focus on understanding the essence of participants who experienced a phenomenon (Chan & Walker, 2015), which was not my goal in this study.

Research Question

What strategies do small retail business owners use to improve their profitability opportunities through global expansion?

Interview Questions

Participants in the interview responded to open-ended questions in a semistructured process. The interview questions were:

1. What strategies have you used to expand your business internationally?
2. What strategies worked well to expand your business internationally?
3. How did you select your international target market?
4. What was your organization’s international market entry mode?
5. What strategies have you used to sustain your international business expansion?
6. What strategies worked well to sustain your international business expansion?
7. How did you address the challenges of expanding your business internationally?

8. What additional information would you like to share about strategies you developed and implemented for globally expanding your business to increase profitability?

Conceptual Framework

I chose Porter's five forces theory as the conceptual framework for this study. Porter's five forces theory is a model that identifies five competitive forces that shape most industries, which helps determine firms' weaknesses and strengths to determine organizations’ strategies. Porter introduced Porter's five forces model to analyze the forces that affect the status and development of industry (Porter, 1980, 2008). Porter's model involves five competitive business powers: suppliers, buyers, substitutes, potential competitors, and industry competitors. Porter's model contains five forces: (a) the power of suppliers, (b) the power of buyers, (c) the threat of substitutes, (d) the threat of new entrants, and (e) the degree of rivalry. Porter (2008) suggested that small business owners could develop strategies to help them become successful by considering these five forces. As applied to this study, Porter's theory holds crucial elements that I used to identify and explore international expansion strategies that small business owners use to develop and implement to improve their profitability.

Operational Definitions

Business strategies: Business strategies are a set of visions, missions, values, practices, and technologies that give a firm a competitive advantage in the market (Pattinson, 2016).

Competitive advantage. Competitive advantage is an organization's benefit over competitors in the form of a low-cost provider or differentiation (Calandro, 2011).

Globalization: Globalization is the process of increasing a business's contribution to foreign markets over time (Casillas & Acedo, 2013).

Small and midsized enterprises (SME). Small and midsized enterprises are businesses that maintain proceeds below a specific level and have a certain number of employees (Small Business Administration (SBA), 2017).

Small business. A small business is a business unit that is independently owned, operated, and structured to generate profit (Small Business Administration (SBA), 2017).

Small business owner. Small business owners are individuals who establish and manage a business to make revenue and expansion (Yallapragada & Bhuiyan, 2011).

Small retail business: Small retail business is a firm that buys and sells goods or services with less than 500 employees (Hunter, 2011; Welch & Birsch, 2015).

U.S. Small Business Administration (SBA). A U.S. government agency with resources to assist small business owners in running the business at the startup and growth phases (Harris & Patten, 2014).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions reflect what the researcher believes to be true without existing evidence (Yin, 2018). In this study, I assumed that the qualitative method is appropriate for exploring the phenomenon under the study. I assumed also that participants honestly answered the interview questions and were able to describe the right strategies they use to expand their businesses internationally. Finally, I assumed that the interview questions were appropriate to collect sufficient data to answer the research question.

Limitations

Limitations are potential study weaknesses that are outside the researchers' control and affect its internal validity (Ellis & Levy, 2009). One of the limitations of this study was that most available sources that relate to the context of this research have a publication date before 2016. I used a sample that includes only participants located in the Northeast region of the United States instead of a random sample that consists of a larger population, which makes the findings of this study not generalizable to a larger population.

Delimitations

Delimitations are the boundaries of the study (Simons, 2014). One of the delimitations of my research is that it is limited to exclusively including owners of small retail businesses who have successfully implemented strategies to expand their business globally. Excluding owners of SMEs who have failed is a delimitation of the study. The borders described in the research are limited to geographical location, which included owners of retail SMEs in the Northeast region of the United States.

Significance of the Study

The findings of this study may be valuable for the business. Globalization has helped in the growth of worldwide trade and finance. Globalization incorporates many disciplines and schools of thought and shares interconnected meanings in different fields, such as sociology, economics, marketing, technology, and political science (Hendee, 2016). Globalization has made nations collaborate closely and has led to faster access to technology, improved communication, and innovation (Rostow, 1991). The opening of the global market is increasing the pressure on businesses to meet the customers' diverse needs. It, therefore, requires developing and implementing strategies to address the derivative business opportunities for benefiting businesses and communities.

Contribution to Business Practice

The media and the literature have discussed globalization, and the most concerning question for small businesses is how it can benefit their business operations. The effect of globalization on small businesses has received a lot of attention in the past few years due to its significant contributions to the economy of both developing and developed countries. Although globalization can help small businesses grow faster and open the world markets, it imposes many challenges to small business operations and their survival at the same time. For example, globalization could result in businesses attempting to homogenize customers' tastes, reduce diversity, and reduce the capacity of nations to protect their national interests, cultures, and values (Audretsch, 2009). Small retail business owners can use the study's findings to develop and deploy strategies to facilitate their products’ integration into the international market.

Positive Social Change

The impact of globalization on positive social change includes increasing connectivity and relationships among people from different nations to facilitate the flow of goods, capital, services, and labor. The globalization of small businesses has positive effects on economic growth, employment, income distribution, and other social benefits such as opportunities for poverty reduction, increasing labor rights, and environmental contributions to improve living standards.

A Review of the Professional and Academic Literature

In this qualitative multiple case study, I explored the strategies that small retail business owners in the Northeast region of the United States apply to enhance their profit opportunities through global expansion. I reviewed the professional and academic literature encompassing the internationalization of SMEs and strategies. I presented in the literature review the theoretical framework on which I based this research project. The theoretical framework serves as a foundation for formalizing the current state of knowledge regarding the research topic is hinged. This literature review is a foundation of the current background state and guides to ensure that I do not repeat others' works in my research. Additionally, I identified existing gaps in knowledge and unsolved problems that this research can address.

I cite past quantitative, qualitative, and mixed-method research in this literature review. Materials cited are from current peer-reviewed articles published in renowned journals. I selected 251 publications on the topic for this literature review. Two hundred twenty-seven of them were published from 2017 and after, representing 90% of the used publications. Two hundred and two articles are peer-reviewed, representing 80% of the total publications. The remaining 10% are from reputable websites and academic institutions' presses. I evaluated reputable databases, including EBSCOHOST, Science Direct, DOAJ, and JSTOR. Articles focusing on international SMEs and the strategies involved with the highest priority. I included reports from the Walden University database, Pro-Quest Central, verified websites, and Google Scholar. The keywords I used were *small business global expansion, small business globalization, international expansion of SMBs, globalization of SMBs, Porter's theory*, *five forces theory*, *globalization strategies*, *SMB expansion strategies*, i*nternationalization*, *SME*, *international business*, *business expansion strategies*, *internationalization theories*, and *foreign market entry*, and *problems with five Porter's model*. I included peer-reviewed articles about small businesses' strategies, growth, and globalization in the literature review.

I organized the literature review into three key sections: the primary conceptual framework, alternative conceptual frameworks, globalization, global expansion, and macro and environmental factors impacting expansion success or failure. The literature review ends with a section examining the retail industry in the United States and the factors affecting the successes and failures of retail businesses. Porter's five forces examined the success of retail businesses in international markets: supplier power, buyer power, the threat of entry, rivalry among existing competitors, and the threat of substitute products. I also delve into theories and evidence-based research that raise concerns over Porter's five forces theory's effectiveness, relevance, and applicability in the modern-day business environment. In the next section, I cover the alternate theories and how they influence business success globally. These theories include Heckscher-Ohlin's theory of international trade, the product life-cycle theory, and the monopolistic advantage theory.

In the third section, I explore other themes relevant to this research. These include issues and strategies associated with the globalization of small businesses in retail and the performance of small businesses from a global perspective. The latter includes an overview of global expansion failures and the effects of global expansion on small business potential. I then bring out the nature of the retail industry in the United States. These include the industry's history, competition, and existing challenges. In the next section, I provide an overview of the critical global strategies for the successful globalization of small businesses. These include the internationalization strategy and the general globalization strategies. The general globalization strategies include strategic expansion, expansion by concentration, strategic partnerships, product/service strategy, and market research.

I conclude the literature review section by looking at the macro and micro environmental factors likely to impact the success of businesses on a global scale. Microenvironmental factors include the availability of employees, distribution channels, level of competition, media and the general public, and availability of investors. The macroenvironmental factors include demographic factors, technological factors, natural and physical forces, political forces, and social and cultural factors. Lastly, I conclude the literature review with a summary of the findings.

Table 1

Summary of Publications Used in the Literature Review

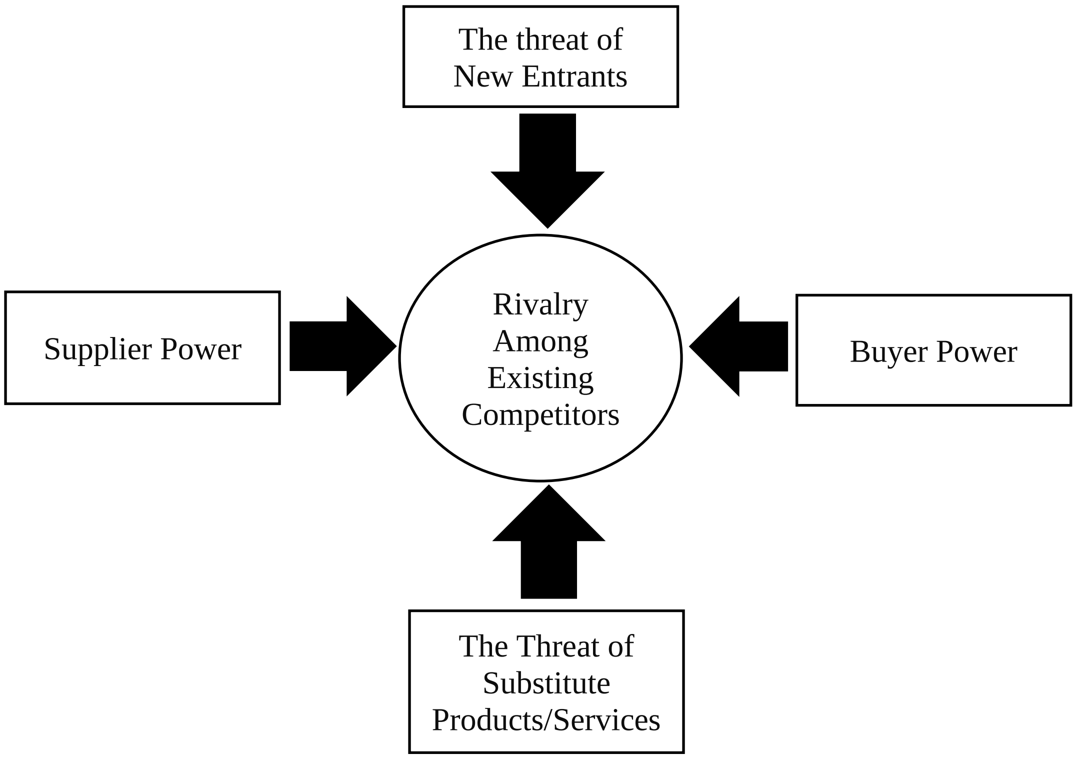
Sources of Publication	Older than 5 years	Within 5 Years	Total of Publication	Sources
Books	2	27	29	11.65%
Peer-reviewed articles	22	180	202	80.48%
Dissertations	0	1	1	0.40%
We-Pages	0	19	19	7.63%
Total	24	227	251	100.00%
% by the period of publication	9.56%	90.44%	100.00%	100.00%

Porter's Five Forces Model

I used Porter's five forces theoretical framework to support this research project. Porter's five forces model is one of the parameters that help guide decision-making regarding international business expansion for SMEs and established businesses. Figure 1 below illustrates Porter's five forces model.

Figure 1

Porter's Five Forces Model (Porter, 2008)



Note. Adapted from "The five competitive forces that shape strategy" by Porter, M. E., 2008. *Harvard Business Review, 86*(1), 25-40 (https://www.hbr.org). Copyright 2008 by Harvard Business School Publishing.

Porter's five forces model states that an establishment's strategy must experience opportunities and threats in the firm's external environment. According to Bruijl (2018), for a firm to be competitive, the establishment must develop a strategy that accommodates an industry's structures and shift. The author stated that the model comprises five industry-related forces: rivalry from competitors, the power of suppliers, the power of buyers, the threat of substitute goods, and new entrants (Bruijl, 2018). The model is that firms need to handle competition within the business environment by focusing on competitors and broadening their perspective concerning industry threats. In other words, Bruijl views this model as an effective instrument for identifying specific forces in line with one particular organizational situation by employing the outside-in standpoint (Rizal et al., 2017). The model distinguishes the macro environment's five points by how they interfere with a firm's profitability.

Porter's five forces model is a tool for determining whether an industry is profitable or sustainable. Rizal et al. (2017) posited that Porter concentrated on outside business perspectives to understand the causes of companies' failure or success. Using the model can enable firms to develop strategies that owners can rely on for their sustainability beyond 5 years (Rizal et al., 2017). Madu (2016) underscored the ideology that Porter's five forces model benefits business persons to improve their position in the market, endure pressure from business rivals, appeal to customers, and sustain their establishments for the long term. The model enables companies to recognize the degree of an industry's profitability or attractiveness.

The Threat of New Entrants

The threat of new entrants entails how easy or difficult it is for new rivals to enter a particular market. Their entry is determined by whether the current organizations are making decent returns (Bruijl, 2018). If the existing organizations earn good profits, a new business could move into the industry and lower the current product prices. The author posits that a high degree of profitability could attract new companies, interfering with its profitability margins. However, Martin (2019) noted that profitability and associated decline become competitive in cases where long-term barriers occur. The market share of existing competitors tends to change when new entrants enter their potential entrants (Anastasiu et al., 2020). The fact that the new entrants increase supply and push product prices down to a competitive degree explains this observation. Gamble et al. (2019) suggested that established businesses can capitalize on their strengths and capabilities to gain a competitive edge above the new entrants.

Buyer Bargaining Power

Buyers' bargaining power occurs when many establishments are in the industry. This phenomenon occurs because the higher the number of companies in an industry, the easy it is to get different suppliers. It is a powerful supplier's flip side (Wellner & Lakotta, 2020). According to Boafo et al. (2018), buyers' high market power gives purchasers the ability to decrease prices. Buyers can negotiate for a better quality of commodities or the expansion of services. When buyers have strong power, an industry's profitability can also decline (Boafo et al., 2018). In other words, the authors posited that buyers have high market power if they can easily switch from one supplier to the next. The key tenet of buyer power targets price reduction and quality service delivery (Wellner & Lakotta, 2020). Wellner and Lakotta seemed to agree with Boafo, Kraa, and Webu's point of view regarding consumers' ability to negotiate for lower prices. Thus, higher power can threaten the profitability of an industry.

The Threat of Substitutes

The threat of substitutes is the degree to which customers can swap specific products or services that can switch with other product substitutes in a competitive market. For example, in the smartphone industry, customers can substitute smartphones with tablets as long as the pills have similar capabilities to smartphones, such as device interfaces. While tablets can serve as substitutes for smartphones in this industry, they may be more appealing due to their uniqueness in shape, size, and functionalities (Kabeyi, 2018). It implies that if a firm establishes a unique selling proposition (USP), it can be a competitive edge over its competitors who supply the substitutes. Omsa et al. (2017) mentioned that goods could only be substitutes when differentiated in place of the present ones. The authors suggested that substitutes heighten the possibility of consumers switching to alternates whenever prices increase. Thus, substitute products reduce the supplier power and the market's attractiveness.

Bargaining Power of Suppliers

Suppliers' bargaining power is the force that evaluates the amount of energy the supplier possesses and their capability to raise product prices. Martin (2019) posited that the higher the power, the lower the business's profitability. The supplier's bargaining power depends on the number of suppliers in the industry. According to Martin, the more suppliers doing business in an industry, the weaker their power. Companies have an easy time in the market when multiple suppliers are present in the marketplace. Suppliers who have a high bargaining power can put prices on their commodities at a higher rate while at the same time offering low-quality materials (Kabeyi, 2018). Buying businesses are directly affected because they have to pay more to obtain raw materials, affecting their profits. Kabeyi (2018) emphasized that suppliers have the upper hand when few raw material substitutes are in the market.

Competitor Rivalry

Competition rivalry tends to impact the company's success factors, including public image, brand knowledge, popularity, and overall revenues. Consequently, organizations have to put in measures such as pricing discounts, introducing new products, and promotional campaigns (Gamble et al., 2019). Pressure from competitors in the industry affects each player's profitability and product prices within a particular sector (Martin, 2019). In pursuit of competitive advantage, an establishment may choose to reduce prices or differentiate its products.

Additionally, a firm could improve products by implementing innovative processes. Gamble et al. (2019) further emphasized that differentiating products and switching costs is vital when intense rivalry. When rivals offer closely related products (substitutes), customers will be more willing to switch depending on prices. Consequently, competitors reduce prices as a means of promoting sales. In sectors where products sold are distinguishable, price competition cannot be the only type of competition (Martin, 2019). Conversely, price competition is the only type of competition when it is impossible to distinguish products.

Five Forces and Business Success in the International Arena

Doing business in the international arena can be challenging if a firm fails to effectively apply Porter's model forces, which determines an industry's profitability. The international market is highly competitive and requires a deep understanding of the industry forces when deciding to go global. Buyer bargaining power can determine the amount of pressure that customers impose on businesses within an industry (Gamble et al., 2019). As stated earlier, consumer bargaining power can reduce a firm's profitability when customers demand high-quality products at lower prices. However, this industry force can still promote business success by enabling a firm to identify consumer needs and provide what customers need (Gamble et al., 2019). Businesses can succeed in the international arena by maintaining an authoritative position in the market and being flexible enough to change consumer tastes and preferences.

International businesses can use supplier bargaining power to increase profitability. It could entail a business being open to the idea of developing and nurturing good relationships with suppliers (Martin, 2019). Suppliers often prefer to partner with large buyers because the serving costs for larger buyers are lower. Ibrahim and Primiana (2015) stated that a supplier would ship supplies to a single large buyer rather than incur logistical charges involved in serving numerous small buyers. This approach gives the business a competitive advantage in terms of production costs and final product pricing.

International businesses can use the threat of substitutes to gain a competitive edge by differentiating, which will promote business success. Substitutes limit a firm's pricing because consumers easily switch to alternative products after performing similar functions. Product differentiation in a foreign market is the only way to prevent substitutes for its products (Ibrahim & Primiana, 2015). It requires the firm to understand what the consumer needs to create demand, especially for its products.

New entrants in an industry cause the existing player to desire a larger market share, and only a few players would be benign when new players emerge. Differentiation is still the key for existing firms to beat new entrants (Bruijl, 2018). Key areas that would require differentiation for the firm's success include information technology, the management of the supply chain, and marketing approaches (Bruijl, 2018). International businesses operating in the same industry can erect entry barriers for new entrants by reinforcing their control over suppliers, channel distribution, and establishing close relations with customers (Pervan et al., 2018). That way, it would be difficult for new entrants to survive in the market.

Competitor rivalry is a significant determinant of a firm's success or failure. Effective strategies against competition would boost the sustainability and profitability of a firm. It is easy for a firm to erode its position in the industry by choosing the wrong approach (Bruijl, 2018). A firm must establish its value as one of its core strategies because all customers like to perceive product value before deciding which brand to purchase.

Porter's five forces model is useful for evaluating an industry's profitability and creating effective strategies and policies. The model encourages firms to view the industry environment from an external forces viewpoint. The five forces in Porter's model include competitor rivalry, the threat of substitutes, the threat of new entrants, the power of suppliers, and the power of the buyer (Juliana & Nyoman, 2019). Companies, especially international businesses, must fully understand these forces and relate them to their specific industries. Failing to do so would lead to a lack of growth, profitability, and sustainability. Approaches, including product differentiation, operational efficiency, and innovation, provide solutions to external market forces.

Researchers' Concerns over Porter's Five Forces Theory

Researchers have explored the drawbacks associated with Porter's five forces model. Khurram (2020) recognized that while the models help advance an understanding of industries, thereby guiding decision-making and the overall success of organizations in international markets, it has several weaknesses. In a critical analysis of Porter's models and associated blind spots, Bruijl (2018) poked holes at its composition. Bruijl claimed that the model is static and provides a snapshot of the industry in the past. It is useful for informing a short-term strategy. Additionally, the window of applicability of the data from Porter's five forces is made redundant and obsolete by evolving external factors (Khurram, 2020).

Certain trends like globalization and the rapid development of technology are now prominent. These factors were not present when Porter came up with his framework. Bruijl (2018) claimed that many of the items highlighted in Porter's model as less worrisome nowadays. This trend has been caused by immediate domestic competition, shifting regulatory requirements, and market perception changes and expectations (Hasibuan, 2019). Bruijl claimed that these factors are now less worrisome than global competitors who provide goods and services across different parts of the world, driving advancements in technology and logistics.

In addition to changing factors, many people, including market researchers and financial analysts, use Porter's five forces in a manner that does not reflect its purpose. One of the most common mistakes involves applying the forces to a specific company instead of the entire industry (Chesula & Kiriiny, 2018). Chesula and Kiriiny (2018) recommended a SWOT analysis for company-specific research and evaluation instead of Porter's five forces. Additionally, Porter's five forces model tends to be challenging for SMEs that operate in diverse industries. Companies' mistake is to amalgamate their product lines into one sector, even if they do not belong to that industry (Bruijl, 2018). The resulting Porter’s five forces analysis tends to give false and unreliable results.

A significant portion of research on the drawbacks of Porter's five forces model has been based on the premise that the model is outdated. However, Fabian (2015) disagreed with this conclusion. Fabian posited that the model is not outdated since companies still operate in a network consisting of buyers, suppliers, competitors, substitutes, and new entrants. This network is still valid for many companies, including those in the service provision chain. Bruijl (2018) supported these arguments by exploring the bargaining power of buyers. Bruijl posited that buyers' bargaining power had increased significantly over the years due to access to much more information via the internet. He also cited the threat of new entrants as a force that has decreased since companies have to make a considerably high investment level in technology. Such investments have a deterrent effect on potential market entrants.

While some authors have tried to defend Porter's five forces model, Fabian (2015) acknowledged widespread criticism, which he terms, has become increasingly severe in recent times. Fabian said that the economic conditions had changed drastically over the past years. One criticism concerns that Porter does not have a valid and convincing justification for choosing the five environmental forces included in the model (Chesula & Kiriiny, 2018). Another criticism is that the model only generates snapshots and fails to take account of the time factors. It is challenging to determine markets with high competition dynamics since it changes quickly.

Hasibuan (2019) was also extremely critical in using Porter's model. According to his argument, time is a crucial component when analyzing industries. Managers who take care of this dimension can consider market trends and the changing operational environment. Applying Porter's five forces model does not guarantee small businesses a competitive advantage in the market (Khurram, 2020). However, they mention that while a business can achieve a competitive advantage, it is not inviolable and sustained. This trend is that Porter's five forces model is static and considers the periodic changes in the competitive environment.

Furthermore, Khurram (2020) indicated that Porter's five forces are now irrelevant. Industry factors justify the differences in business performance, which he claims can only motivate up to 20% of variations in market share, industry profitability, and growth. Today's goal is to ensure that businesses cushion themselves against the five forces and become more critical to implement innovative ways due to the increased leverage the internet has on today's business performance (Fabian, 2015).

Alternate Theories

There are alternate theories that can help understand business expansion strategies in addition to Porter’s five forces model. These include the Hecksher-Ohlin theory, the monopolistic advantage theory, and the product cycle theory. This section describes these theories about international business trade and expansion across the retail industry.

Heckscher-Ohlin: Theory of International Trade

Ohlin's international trade theory is a mathematical trade model that predicts production patterns and commerce based on the factors that endow a region's trade. According to this theory, the country exports its natural resources and only the products in excess (Jha, 2020). The theory also explains that many countries import scarce resources from other countries that have those resources abundant. For example, the United States primarily imports oil from the Middleast countries with excess oil and exports electronics to most countries that do not have extra materials to make them. The theory is an equilibrium theory that tries to balance the available goods in the countries by removing excess and gaining the scarce.

The theory compares a country's comparative advantage to the resources present in that country, such as capital, land, and labor. Many comparatively advantageous countries have production resources in abundance, and the resources are found locally within the country's boundaries (Jones, 2018). When many resources are required to produce the available goods, the goods are likely to generate more profit due to the low input costs. For example, a country with adequate technology gains more profit in selling cars than the countries that import the resources required to make the cars, such as engines and other materials.

There are cases when a country may have some of the resources required for production and lack some. In such cases, the country may still have a comparative advantage, mainly when producing goods that require only the available resources. For example, a country may have much capital and less labor but still gain a comparative advantage by producing capital-intensive goods and importing labor-intensive goods. Celi (2021) argued that countries with more labor and less capital can still benefit themselves by producing and importing capital-intensive goods. For instance, many African countries have less capital and labor; they produce labor-intensive and import capital-intensive products from European and American countries.

Countries with abundant land and labor deal mostly with crop production and capital-intensive import products from other countries. According to Laffargue (2019), capital and lands intensive goods such as maize grains are cheap at local and import levels than labor-intensive goods such as technology. According to Shiozawa et al. (2017), single production factors such as labor would not yield a comparative advantage without other inputs such as technology. The technological differences in the countries lead to the comparative advantage of one country over the others (Senga et al., 2017). They argue that if there were no technical differences between the global countries, then no country would depend on the other for the goods, and all the countries would be able to produce all the goods.

Ohlin's theory disagrees with the Ricardian model and states that other factors apart from technology determine a comparative advantage. Heckscher and Ohlin stated that capital variations also lead to the comparative advantage of a given country over other countries. A country with good infrastructures, such as roads and ports, has a high comparative advantage because the infrastructure also reduces the production of goods due to ease in transporting the raw materials from the sources to the production factories. The countries with poor infrastructure will spend much time and capital producing the goods as there will be much time wasted transporting the raw materials to the processing industries, thereby making them yield fewer profits from the goods than the countries with good infrastructure. Heckscher and Ohlin also disagree with the Ricardian model, which states that capitalists' choice of profit maximization is the base for the comparative advantage. Król (2019) stated that investors privately hold capital, which cannot determine the comparative advantage. Only two factors, capital, and labor abundance, differentiate a country from the others (Etro, 2017). The capital-labor ratio can assess the development of a country.

Effects of the Theory on Global Business Expansions. Nations with more capital and less labor will have to export the more capital-intensive goods and import the labor-intensive goods for use, which means that some places will not grow to produce the goods and services other nations produce due to their lack. All the nations that produce capital-intensive goods will continue to produce the same goods and labor-intensive import goods to balance the equilibrium (Uddin, 2021). The case is challenging because most nations will have to depend on others to produce the necessary goods.

When the production of goods halts, other nations will have to stand still, waiting for the producers to resume working. With that model, the countries in need will have to stop using the goods and wait. Being at a standstill is challenging for international growth. All the countries should be in a continuous exchange, which means that the organizations that need the products for use will have to pose any operations (Uddin, 2021). Their expansions by using the products produced by other nations will halt any expansion to the global stage.

In cases where other nations impose barriers, some organizations will have to stop their operations if they depend on imported products. For instance, an organization in Mexico that imports machinery from the United States will have to stop its operations if Mexico imposes barriers to imports from the United States. According to Ruiz-Nápoles (2018), overdependence on a given nation's produce mostly leads to the lagging of other countries when differences between the two rise. More risks are related to overdependence than the good that comes from it.

The over-dependence on certain nations for goods and services guarantees the countries that produce the goods in question and sell them at high costs compared to the products made by other nations. For instance, Kenya produces most of the flowers sent to European countries and imports the machinery they produce in large quantities. Thus, the European nations will increase the prices of the pieces of machinery as they are capital intensive, which means that all organizations involved in the production of flowers will not grow to the international levels. At the same time, they give out more cash for the machinery they receive from other nations. The organization has to reduce its external dependencies while increasing its production to grow. According to the Heckscher-Ohlin model, the nation’s exchanging products can take advantage of others as they cannot produce their products, inhibiting the growth of those nations to the global level.

Overdependence on some nations for importing certain products might lead to their own failure if they prefer other nations in their place. Suppose two companies exporting milk to other countries depend on it for machinery. In that case, it may select one organization and supply the machinery that will increase its competitor's ability to continue being in business and limit others from moving forward. Competing with the individuals who have most things right makes it hard to grow internationally.

Heckscher Ohlin's model bars many organizations from moving forward and operating at the international level. According to Kussy et al. (2020), most of its problems arise because the model opens the uneven distribution of the products that some organizations produce to other organizations that need them the most. Overdependence on other countries to produce goods and services usually limits most businesses from growing internationally.

Product Life-Cycle Theory

Product life cycle theory refers to an economic theory developed by Raymond Vernon due to the Heckscher-Ohlin model failure, which explains the observed international trade patterns. According to the product life cycle theory, the product's parts and associated labor originate from the product's invention area during the early life stages. On the other hand, upon adoption, movement, and utilization of the product by other world markets, the product experiences a gradual but consistent shift away from the point of invention. In some cases, the product can become an item of importation by the same country as the original invention. The invention, growth, and production of personal computers with the United States as a country of invention origin form a widely used example of the product life cycle theory.

In simple terms, the theory explains the cycles experienced by by-products when exposed to global markets. As a result, the cycle describes how a product matures and declines due to internationalization. The theory entails four stages of a product's life cycle, as illustrated below.

Introduction Stage. It involves one of the most expensive product stages, more so for companies launching a new product in the market, which is usually due to the small nature of the product or the high existence of similar or competing products. As a result, the expectation is that the sales will be prolonged during the initial stages, although there are strong hopes for improvement in the future. Introducing a new product into the market may include other cost factors associated with research, consumer testing, development, and marketing.

Growth Stage. This stage of the product life cycle is usually associated with growth in sales and profits on a product. Growth is mainly related to economies of scale benefits in production, leading to increased profit margins and overall profits. Similarly, due to the increased sales, the company is therefore financially allowed to increase its promotional activities investments to increase further or maximize its sales growth for products at this particular stage.

Maturity Stage. Products also attain the maturity stage, just as in the life cycles of both human beings and other living things. The maturity stage of a product life cycle involves commercializing the product to the highest number of customers. Similarly, the product should reach its topmost establishment level at this stage. The quantity of sales also registers consistency hence being very predictable. Maintaining the already built market share for the product is the most common challenge experienced by a company with a product at this stage. As a result, this stage of a product life cycle forms the most competitive stage, demanding wise marketing decisions. On the other hand, businesses also need to consider product modifications or process improvements as a competitive advantage.

Decline Stage. Shrinking the market size of a product characterizes the decline stage of a product's life cycle. Market saturation by competing products and shifting customers' actions to other different types of products are the main cause of shrinking the market size. Although this stage of the product cycle may appear inevitable, companies might still profit through investment in less costly production methods and techniques. Similarly, exploring cheaper markets can also be productive and rewarding for products at this stage.

Effects of Product Life Cycle on The Ability of a Business to Expand Globally. During the introduction stage of a product life cycle, either the location of the business or, somewhat, the product's invention point significantly limits a business's ability to expand its market size (Nadeau & Casselman, 2016). As a result, the possibilities of a business to explore the global market are ideally unrealistic, limiting the business's global expansion potential (Nadeau & Casselman, 2016). The reality that the customers can easily accept a product in the introduction stage around the product invention area or point is the cause of this concept (Kessler & Pozen, 2016). On the other hand, limited distribution of a product in the introduction may also contribute to the ability of the involved business to expand globally (Day, 2015). The limited distribution at the early stage is because the business shall tend to concentrate on the local surrounding environment of the product initiation location, limiting its ability to expand globally.

Additionally, the growth stage of a product life cycle forms the beginning of interest for a business to start developing policies and strategies for exploring the global market, which does not necessarily imply that the business has already exhausted the domestic market (Nadeau & Casselman, 2016). Instead, the business is experiencing progressive and promising growth in sales, influencing its interest in the global market (Day, 2015). At the growth stage of a product life cycle, a business typically registers a substantive increase in product sales and profits, forming an attraction point for the competitors.

This stage usually encourages the global expansion of business operations. Businesses with products mainly concentrate on promotional and distribution activities, which eventually exhaust domestic markets and identify market gaps in other countries (Day, 2015). More ever, at the growth stage, businesses focus on engaging foreign distributors and dealers to expand their market and build long-term relationships due to the increased presence of competitors who dominate the domestic market (Nadeau & Casselman, 2016). As a result, business starts to develop the ability to expand at this stage globally.

The maturity stage forms the peak of the global expansion of most business operations on particular products. The maturity of the business attributes maximizes the accumulation of profits and exhaustion of domestic markets due to the long existence in the market (Day, 2015). As a result, most businesses find it comfortable to invest in other countries, thereby encouraging global business expansion. Similarly, at the maturity stage of a product, most companies tend to slightly variate their product's specifications depending on their target market or country as a way of developing a competitive advantage since most of the product sales tend to be at the optimum and constant at this stage (Nadeau & Casselman, 2016). Businesses explore the maximum of their global market at this stage of a product life cycle, thereby achieving their best international sales (Kessler & Pozen, 2016). Businesses with products at this stage have the highest ability to expand globally.

Lastly, at the decline stage, several businesses tend to withdraw their presence in the global market, caused of a substantive decrease in profit margins and sales, making the business unsustainable (Day, 2015). The change in consumer tastes and the entry rate of competitive products globally prompt the decline in profits and sales at the decline stage. As a result, the decline stage discourages the ability of a business to sustain its global expansion efforts (Kessler & Pozen, 2016).

Monopolistic Advantage Theory in International Business Expansion

The theory explains the advantages a company or firm will likely get when it operates internationally. According to the theory, these benefits arise from the firm's uniqueness, not location. These benefits also accrue to specific firms, and the advantages they enjoy cannot be borrowed or imitated by other firms. Stefan Hymer argues that firms that operate at international levels enjoy monopolistic advantages compared to firms that operate within the locality. The theory has been supported and criticized when it comes to its use in expanding a business globally.

Multinational firms enjoy some benefits, such as economies of scale, making it possible to open more branches in other parts of the world. According to Kano and Verbeke (2019), an economy of scale ensures that a firm saves on the cost of production while producing more, making it possible for such a firm to grow globally. In addressing the political aspects of MNE theory, Boddewyn (2015) mentioned monopolistic advantage theory as one of the MNE theories that have made it possible for firms to expand globally due to political elements involved in the ownership and localization of business.

Makoni (2015), in the analysis of business theories involved in foreign investment, addresses the monopolistic advantage theory. According to this author, being a monopoly in the market, especially when dealing with essential goods, guarantees easier penetration to other markets within and outside the homeland country of a firm. Supporters of this theory further argue that it is important in creating wealth and extra capital for a firm (Kurz, 2017). They further argue that firms can create more wealth through technological advancements and invest in other businesses in other parts of the world.

In addressing business globalization, scholars of international business have incorporated monopolistic advantage theory as one of the mechanisms that help firms expand. These scholars acknowledge adopting a monopolistic advantage as a tool to expand internationally and globally (Aharoni, 2015). These monopolistic advantages are means to overcome the challenges when firms dealing with high competition levels venture into a global business.

The monopolistic advantage theory is one of the theories in foreign direct investment. Still, the theory does not work for all firms that want to expand globally. Conditions such as technology used by the firm, the quality of monopoly power, and access to raw materials affect the ability of a firm to venture into a global business. A firm might enjoy monopolistic advantages, but these aspects also determine its ability to expand globally. Researchers have argued against internalization theory and focused on an orchestration theory that focuses on the factors that challenge the use of monopoly advantages to move toward global business (Pitelis & Teece, 2018). The challenges that come from monopolistic advantage theory and internalization theory were addressed in orchestration theory, which includes innovation and co-creation of the market. According to these authors, solving these challenges helps a firm expand its business globally.

Buckley (2019), in the argument against the theory as a global expansion tool, claimed that poverty is a result of local monopolies. Among many other reasons for developing countries' survival is having monopolies. Given this, a firm cannot use a monopolistic advantage to expand globally. According to Buckley, competitive advantage plays a significant role in the global expansion of a firm.

International expansion case studies from multiple theories perspective

Organizations must appropriately assess the risks associated with international expansion and genuinely understand foreign markets in which they invest to plan accordingly. According to Rizal et al. (2017), there is no stable relationship between the various theories for businesses’ behaviors during a global expansion. Retail Businesses may use Potter's five forces model in conjunction with an alternative theory to analyze the profitability of an industry before designing an international strategy.

For example, the outcome of Porter's five forces analysis reveals that Walmart's strategy must prioritize competition and a new entry due to threats from market saturation and the advancement of local merchants' competitive advantages (Yoder et al., 2017). On the other side, Heckscher-Ohlin's theory analysis disclosed that Walmart's international expansion strengthens its position over the land, labor, and capital production factors (Laffargue, 2019), which stands with Potter's model recommendation. Walmart could lower laborers' expenses by outsourcing to its highest intensive labor locations, which will empower Walmart to fulfill its strategic priorities identified from Potter's model.

Although international expansion offers many opportunities, it also carries risks and could deliver inconsistent outcomes for the same firm. Organizations should understand the foreign markets they are planning to invest in, assess the associated risks, and build effective plans for that international expansion. Conaty (2016) conducted a multi-case study on strategic expansion factors for Target, Walmart, and Tesco. In the comparison of Walmart's expansion into Canada versus Germany, Walmart expanded successfully in one country (Canada) while failing in another (Germany) (Conaty, 2016). Similarly, comparable organizations may employ identical techniques in a particular country, but multiple factors might lead to one company's failure and the other's success (Martin, 2019). Even powerful organizations could fail in international expansion if they did not conduct sufficient market research or create a viable plan.

Product life cycle theory helps entrepreneurs design the international trade path during the product's maturity cycle. Before expanding globally, business owners should conduct extensive research on industry analysis and speak with consumers, suppliers, and other industry stakeholders (Nadeau & Casselman, 2016). For example, Fast-Moving Consumer Goods (FMCG) are in high demand and quickly sell at a low cost. The FMCG market is very competitive and focuses on attracting customers to preserve the shelf life and integrity of the product (Oraman et al., 2011). According to the product life cycle theory, the location could limit the product's expansion at the introductory stage, so the focus should be on growing in the domestic market concurrently with differentiating their offering (Kessler & Pozen, 2016). International expansion becomes essential in the growth stage since it reaches market saturation and attracts more competitors.

Entrepreneurs can also use Porter's five forces model to analyze the FMCG industry's profitability before designing an international strategy. Not all of Porter's five factors are equally essential for the food business in the FMCG sector.

Oraman et al. (2011) used Porter's five to evaluate enterprises' survival and competition through global expansion, using ABC, a Turkish food company, as the case study in the FMCG sector. Orman's analysis demonstrated that the FMCG industry's profit margins are poor due to the high competition. Small businesses, like ABC, are more likely to succeed if they focus on the needs of their local market to improve their industry's standing in the competition. Growing corporations will need access to worldwide markets through globalization to remain profitable. The outcome of Porter's model analysis for ABC aligns with the product lifecycle recommendation of focusing on succeeding domestically in the introduction stage and considering global expansion in the following stage.

Other Themes

Other themes that form an integral part of this project include the globalization of small retail businesses, an overview of the retail business environment in the United States and worldwide, and a global expansion strategy. This section discusses researchers' perspectives and findings on globalization and provides an overview of the retail industry.

Globalization of Small Business in Retail

Various researchers have defined globalization and its reach. Ferreira (2020) described globalization as the modern global system characterized by multiple links and interconnectedness transcending nations. According to Saw (2018), these links are an intricate social change process made possible by technological advancements, creating a flow of ideas, capital, people, and goods, in addition to technology, to previous distinct cultural regions. Overall, the characterization of the concept of the global economy uses the concept of globalization (Witt, 2019).

Global expansion is different than globalization. It refers to businesses expanding beyond the home nation-state into international markets (Anwar, 2018; Sidorov et al., 2017). Global expansion occurs when products and services the company sells to customers outside the country where those goods and services are produced (Bugador, 2019). Reuber et al. (2018) also noted that global expansion might entail shifting company operations across national borders to respond to risks and opportunities in local and international environments. However, a lack of awareness of the intricacies of international markets may limit expansion possibilities for some organizations (Efremov & Vladimirova, 2019).

Businesses Viewed from a Global Perspective. Researchers present various reasons why companies expand into global markets. According to Dollar (2017), emerging new markets provide opportunities for enterprises to expand their business. Such markets include Latin America and China. However, global expansion can be challenging. The successful expansion of market share through globalization requires companies to learn and understand customer preferences in these markets (Dollar, 2017). For instance, when Kraft Foods expanded its business into China, its managers understood that it had to change tastes to suit Chinese cultural tastes. Due to the leverage of this cultural knowledge, Oreo is now the best-selling cookie in the new market of China. According to Millar et al. (2015), global expansion is a growth strategy facilitating sales objectives. The authors posited that businesses should learn the importance of strategic alliances in expanding market share in international markets. International expansion through strategic partnerships helps beat the competition by reducing barriers to market entry, thus increasing sales revenue for organizations. In most cases, understanding the process of exporting and the outcomes is difficult (Assadinia et al., 2019).

The second reason for the global expansion of businesses is diversification. Company managers review their business strategies because of the changing business environment characterized by stiff competition (Curran & Eckhardt, 2020). Company strategic thinkers must be innovative to remain competitive (Petrů et al., 2019). There is a rising need for businesses to demonstrate their relevance to stakeholders (McDonagh & Commins, 2018). Many business owners consider diversification as one of the approaches to creating value. Petrů et al. (2019) suggested that value is created by venturing into diverse business lines and operating in international economies.

Diversification allows companies to acquire different businesses and expand globally into new markets. The writer emphasizes that an increase in earnings from one nation can offset a drop in market performance in a foreign market (Petrů et al., 2019). According to Tabors et al. (2017), diversification helps companies learn by introducing fresh products and technologies into international markets, leading to more significant long-term growth. Diversification brought by global expansion protects an establishment's bottom line from unexpected misfortunes. The thriving market operations in a different global market can offset an adverse increase in a single international market (Maloney et al., 2020).

The third reason for global expansion is innovation. According to Rees et al. (2019), when the home market's demand shrinks, a firm realizes the need for quality upgrading and market-oriented strategies. Successful expansion into international markets cannot be possible without innovation (Belousov, 2020). Business leaders appreciate this fact and view it as an opportunity to innovate to meet international standards. Ulaj (2019) indicated that Arcelik, a home appliances manufacturer, went into the global market to innovate and meet the international market's demand. The firm faced negative growth in its local market, forcing it to go global. However, the establishment had to improve its production processes through strategic partnerships with multinationals since innovation is one of the prerequisites for success in international markets (Ulaj, 2019). The current globalization wave requires firms to collaborate and share design and production networks (Vrontis & Rossi, 2016). Thus, innovation becomes a reason for going global to keep up with international trends and demands within the business environment.

Businesses also expand globally to gain a first-mover advantage in an attractive market. Mover advantage is a term that outlines the perks that firms enjoy due to having a robust capacity to enter a prospected market early enough (Sabatier & Chollet, 2017). Querbes and Frenken (2017) highlighted some of the key advantages of mover advantage. These include having a continuous and reliable source of available raw materials and developing robust distribution (Sabatier & Chollet, 2017).

However, researchers posit that establishing substantial entry barriers for rivals who may want to enter the market must accompany the first-mover advantage (Querbes & Frenken, 2017; Sabatier & Chollet, 2017). Sabatier and Chollet (2017) evidenced this in their study. The two researchers indicated that new markets characterized by substantial barriers lead to considerable time for companies to gain substantive entry. Tey et al. (2020) suggested that timing is critical for firms to gain a mover advantage.

Effects of Global Expansion on Retail Businesses. Ellefsen (2016) indicated that there are downfalls concerning businesses' international expansions. The author noted that being overzealous in global expansion could expose the company to these adverse effects. According to Ellefsen, overzealousness could affect the firm if it retracted from the foreign market. Consumers could perceive the firm as weak and affecting its reputation in the market (Raju, 2018). Yoder et al. (2017) revealed that global expansion could cause a business to incur severe losses, hurting the firm economically. They showed how Target, the Minneapolis-based firm, had to withdraw from the Canadian market. In 2011, Target invested over four billion dollars in establishing stores in Canada (Dahlhoff, 2015). However, in 2015, the firm abandoned Canada, which had severe financial implications (Dahlhoff, 2015). Ellefsen suggested that the retraction of an establishment’s expansion initiatives could adversely affect its subsidiaries or branches, affecting a firm’s profitability. Ellefsen further posited that a firm must be sure of its expansion capacity before embarking on global expansion. Gao et al. (2017) agreed that the road to international expansion is not easy because of the immense challenges. According to Gao et al., failing to cope with information technology within the global climate could affect its competitiveness. The author suggested that firms that expand globally must sense technological transformations and implement the necessary solutions.

The sustainability of an international business's functioning relies on software and hardware. Buckley et al. (2017) revealed that the global marketing environment presents many challenges and risks. The authors stated that companies might face the challenge of laws and regulations in their countries of operation, such as product promotion restrictions. An alcohol-producing company seeking to expand in the Indian market is a perfect example. According to Gupta and Bhaskar (2016), the Indian government prohibits the advertising of alcoholic liquor. Such regulations would affect the business performance of such a firm in India. As a result, the company's return on investment may be lower. Cultural issues may affect business performance in product consumption (Gao et al., 2017). Companies seeking to expand globally must understand consumers' culture.

A particular market's cultural identity determines how consumers perceive the products offered by international brands. In their research, Gao et al. (2017) found that it is vital for firms to expand globally to study countries' cultural patterns before market entry. In their study, Yoder et al. (2017) provided an example of Walmart, which did not accommodate German culture and attitudes. For instance, Walmart expects employees to greet customers as they enter and leave the stores (Ernst & Haar, 2019). Nonetheless, Germans were dissatisfied with the fact that strangers greeted them. Walmart's decision to offer pre-packaged meat was not appealing to the Germans. This phenomenon occurs because they prefer to purchase meat cuts from the butcher. A loss accrual of one billion dollars led the company to exit the German market in 2006 (Yoder et al., 2017).

Global Expansion Failures. There exist cases of establishments that failed to expand globally, including Carrefour, the leading retailer in France. Ryu and Simpson (2017) revealed that Carrefour's entry into Japan was not smooth. The company faced aggressive competition in prices from domestic players in the market. The Japanese market contains high-income household that prefers luxury products. According to Ryu and Simpson, Carrefour failed to understand the Japanese culture and buyer preferences because it offered locally standard products. Japanese consumers appreciate a stylish atmosphere in stores that are not sensitive to price. Tesco also failed in its global attempts into the Chinese market. According to Hopkins (2015), Tesco was unsuccessful in enticing Chinese consumers as it only captured a small portion of its grocery market.

Despite its strategy for the merger with the China Resources Enterprise, the brand was still unfruitful. The reason for Tesco's unsuccessful expansion into the Chinese market was ineffective research (Hopkins, 2015). Warwick Business School researchers showed that the Clubcard approach was unsuitable for Chinese buyers. The Chinese like having control over cooperative programs that favor them. As mentioned earlier, Walmart failed in its expansion into the German market. According to Clark (2006), Walmart could not convert China's consumers to its low-price approach. After nine years of impacting the market, the German business environment could not favor Walmart's business model. Sam Walton's sell-cheap retail style did not appeal to the consumers (Perrine, 2018). The company also faced accusations of small pushing retailers out of business. Walmart's biggest mistake was failing to understand the consumers' culture and needs.

The Retail Industry

The United States is one of the world’s biggest economies. The retail industry is an economic sector comprised of establishments engaged in selling finished goods to consumers. The top world retail companies, including Walmart, Target corporation, Amazon, and Costco, are mainly American. Two-thirds of the United States GDP approximately emanates from retail consumption (Farfan, 2019). Thus, the retail store openings and closures are a strong indication of the overall state of the United States economy. Euromonitor International (2018) data reports stated that the United States had a total of $ 5.4 trillion in sales in 2018. The beauty and health sector had a significant share, with the footwear and apparel sectors taking the second-biggest share.

National Trade Federation (2020) also denoted that there were almost 4.2 million retail stores across the country in 2018. These businesses made up 11.6% of all business establishments in the US in 2018, providing 32 million employment opportunities for American workers accounting for 16% of the national total (National Trade Federation, 2020). Farfan (2019) denoted that the two primary methods of retailing comprise brick-and-mortar store retailers selling products from physical locations and non-store retailers, whereby products are sold using marketing methods and do not include physical locations. The retail industry has experienced tremendous growth in e-commerce as consumers have shifted their spending online.

History. The history of the retail industry dates way farther back as people existed from barter trades in 9000 to 6000 BC to the introduction of the first shopping mall in the 1930s (Bhasin, 2019). It was until 1872 that Aaron Montgomery created the first mail-order catalog for rural shoppers (Friedman, 2020). In the mid-19th century, grocers started selling non-manufactured goods like sugar and tea. According to Bhasin (2019), the tremendous growth of the cities in the second half of the 19th century resulted in city markets that were inconvenient to the growing number of individuals.

Department stores started to arrive in the mid-1800s to early 1900s (Surdam, 2020). Meyer (2019) reported that the later 19th century and early 20th century experienced business and economic changes as agriculture replaced industry and manufacturing. Department stores like Sears and Macy’s started to pop up in the cities like Chicago and New York and influenced American life (Bhasin, 2019). The advancement of technology in the 1920s to 1950s included refrigerators, automobiles, and increased catalogs (Friedman, 2020). The first supermarket was established in 1929 but was affected by the Great Depression (Surdam, 2020). In 1930, the first mall was opened in Dallas, and the first regional mall was constructed in Edina (Meyer, 2019)**.** Some department stores that sprung up include Marshall fields and Macy's Hudson. The retail giants' efficiency and overall size attracted consumers seeking convenience, personalized, and more focused services.

Competition. The United States retail market is very competitive, so it is difficult for foreign brands to position themselves. Several of the largest retailers are found on the east coast and in the Midwest parts of the United States. The United States retail market is attractive, the requirements for new market entries are high, and the competition against established brands is high. Bhavana (2016) mentioned that some retail firms' competitive strategies comprise quality and service-driven strategies to acquire customers and retain the existing ones. Wilbard et al. (2018) added that retailers consider location and convenience shopping to be competitive in the market. Bhavana also reported that retailers are using the Internet of Things technologies to gain a competitive advantage by improving the ecosystem that connects the digital and physical world, allowing real-time interactions with consumers inside and outside the store.

Challenges. Global retailing plays a significant role in the world economy, which results in a retailing activity where several retail firms look for expansion in novel sites around the globe to gain a more significant market share and increase profits. Nonetheless, retailers face challenges while expanding internationally. Yeng and Yazdanifard (2015) reported that United States retailers might encounter challenges looking for suppliers as they expand due to cultural differences and influences on business processes in diverse countries. Besides, business transparency varies amongst different states. Homburg et al. (2009) stated that retailers must understand a country's culture before starting an operation. There is also a challenge of non-standardization across boundaries in retail activities, which affects different product production characteristics. According to Homburg et al., cross-cultural differences in customers' attitudes and values towards products and services may affect multinational retailers, particularly with the customization and standardization of their international products as they expand to new markets.

Language barriers may happen within different parts of the international business as increased globalization means further product distribution, operations, trade, and linguistic boundaries (Guillouet et al., 2021). Language may create barriers between executives and employees in a global organization where senior employees are brought in and cannot speak and understand the local languages. However, retailers faced the challenge of crafting motivational strategies that suit various interest groups and employee demands (Guillouet et al., 2021). There is also an issue of different education systems whereby sustaining top-notch organizational performance relies on knowledge transfer and organizational learning.

Global Strategy Overview

Researchers have explored global business strategy and its integration with internal business processes and control mechanisms. A global system entails developing an organization targeting growth abroad by selling services or goods beyond its borders

(Vlados et al., 2018). Hitt et al. (2016) stated that development is a critical phenomenon in small businesses as their survival often depends on their ability to participate in the market with other large firms. Such expansions may entail adopting an international plan. According to Tallman and Pedersen (2015), global strategy entails studying cross-border activities relating to economic agents or enterprises' governance that are engaged in such activities. Kara and Fırat (2018) highlighted the various risks involved in global expansion. According to the authors, businesses expose their internal infrastructure and framework to unmeasured and undetermined environments in order to spell unexpected failure or success. Kara and Fırat indicated that these risks often revolve around cultural elements, legislation, physical distance, and uncertainties.

However, such a transition also benefits more from user preferences, resources, and knowledge diversity. Hitt et al. (2016) outlined the essential primary motivators for global expansion, including locational market advantages, policy, resources, labor, and target nations' distinctive characteristics. Executing international strategies offers flexibility since businesses can shift their operations across national boundaries to respond to environmental opportunities and risks (Kerr, 2016). Formulating global strategies is an ideal approach to enhancing business growth and sustainability.

Global Strategies for Small Businesses. Researchers have put forward varying definitions of small businesses. Small businesses are primarily defined based on ownership, employees, and annual revenues. The Small Business Authority (SBA) classified companies whose yearly receipts do not exceed $5 million (Yeganeh, 2020). The principal capital for such enterprises is the money used to finance their operations, acquire assets, and perform various functions (Zeller, 2017). Zeller (2017) defined a small business as a privately owned partnership or sole proprietorship with less capitalization and fewer employees than a regular-sized enterprise or corporation (Petti et al., 2019). Their employees should be less than 500 and have a market cap of less than $3 billion (Hitt et al., 2016).

Additionally, small enterprises grow faster than big ones. Small-size enterprises are more open to innovations and grow fast to sustain competitiveness (Osano, 2019). However, businesses in established industries may grow slower due to reduced opportunities (Knudstorp et al., 2017). Small business owners could pick one of the three strategic choices for going beyond their local borders, including international, global, and multi-domestic strategies.

International Strategy. Researchers have explored internationalization as a strategy for businesses to achieve global expansion. The internationalization strategy is an entity's series of steps and action plans to offer guidance on widening its market research and subsequent revenue potential by moving into market spaces beyond its domestic domains (Luiz et al., 2017). In contrast, it could mean importing products from other nations to sell to the domestic market (Talar, 2017). With this plan, an enterprise sets up its headquarters in its country of origin, saving the need to hire staff and rent facilities abroad. Rossum (2017) argues that this strategy is ideal for businesses that export principal resources for large organizations overseas. The internationalization strategy allows for an adjustment (Nan & Wang, 2018). A company’s management could use it to test the viability of targeted international markets before adopting another approach to improve efficiency and generate higher returns.

However, researchers have brought some challenges associated with the international strategy. For instance, the processes involved in legally establishing administrative points and local sales in overseas markets are often tedious and could be costly for some small enterprises (Luiz et al., 2017). While majorly leaning on the strategy's positive attributes, Luiz and colleagues admit that the strategy could prove challenging for a small-sized company to manage global logistics involved in the transportation of products across borders. Furthermore, Lahy et al. (2018) stated that ensuring compliance with the various foreign trade and manufacturing regulations could be quite demanding for a small enterprise that adopts this strategy.

The Global Strategy. Researchers have attempted to define a global strategy to advance an understanding of international business expansion. Micheli and Carrillo (2016) defined global strategy as pre-formed initiatives established by small and large businesses to promote anticipated business goals and objectives by considering a more comprehensive market audience that extends beyond the business's home country's scope. This definition is in line with the one put forward by Ignatius (2017). The author argued that businesses enhance their credibility and overall profitability by actualizing anticipated business goals by exploring more expansive and advanced spaces. This approach involves optimally leveraging economies of scale to enhance a firm's reach and improve revenues while minimizing costs (Ichijo, 2018).

However, researchers argue that there are necessary modifications that businesses must make to pursue this strategy and realize its success optimally. Luiz et al. (2017) argued that an enterprise must be ready to modify its goods and services to match each foreign market for this plan to work. For instance, they posited that if targeting the food and beverage industry, the company must modify some menu items to fit the given local market better. However, the business must maintain a homogenous identity across nations to promote its brand with an unbroken international message. Pelayo-Maciel et al. (2017) posited that while this approach can significantly increase an enterprise's revenues, the logistics involved in establishing a business overseas could be quite challenging for a small business.

While company strategic thinkers have explored the concept of global expansion as an ideal way to promote growth and expansion, there is a need to investigate, from available literature, the idea of globalized strategic development. Researchers have published various definitions to understand global strategic expansion. When a company applies measurable, realistic, time-bound, and action-based procedures and protocols to achieve its expansion goals, it pursues strategic growth (Zhang & Warner, 2017). Pelayo-Maciel et al. (2017) viewed the concept of strategic development from a different perspective. The author concluded that strategic expansion entails growth while considering micro and macro socio-economic factors. In short, the authors concluded that strategic development is a holistic strategy that focuses on growth and other factors such as corporate social responsibility, compliance with government regulations, market research, and product development.

Strategic Expansion. Researchers have brought forward certain elements that characterize global strategic expansion for the business. These include integration, cooperation, internalization, diversification, and concentration (Pelayo-Maciel et al., 2017). These elements have been subject to numerous debates, some critical while others casual. Lynch and Jin (2016) argued that these elements do not provide a comprehensive view of the strategic global expansion initiatives. The increasing globalization and high amalgamation of technology and new trends in the global environment (Faghih, 2019). Nonetheless, in this literature review, I discovered that researchers have widely approved four elements as the fundamental lens for viewing and understanding global expansion strategies' dynamics.

Expansion Through Concentration. This form of expansion is considered the first global expansion level for small and large enterprises. It involves investing resources in the product line and catering to the specific needs of the markets identified (Osano, 2019). However, it is impossible to achieve this objective without applying proven and tested technology. Various pieces of literature have widely explored expansion through concentration (Marrero Pagán, 2017). Wang et al. (2018) discovered that concentration strategies focused on developing product lines that matched the specific needs of people in the sampled markets generated more desirable results than those focused on product lines that concentrated on producing uniform products across all regions (Clark, 2006).

On the other hand, it suggests that the effectiveness of concentration as a globalization strategy is a determinant of three critical marketing fonts. These include an amalgamation of resources to develop an existing product in existing marketing, producing a current development in a new market, and a new product in a current need (Clark, 2006). While examining each of these fonts, Clark discovered that amalgamation, which consists of developing a new development in the current market, provided an ideal option for pursuing global expansion over the other two. He bases his arguments that a new product allows for the optimal application of new technology and considers factors specific to the targeted market (Jamal & Chellakan, 2020). Concentration tends to give the expanding business the opportunity for specialization (Hopkins, 2015). The company tends to focus only on one product line, thus specializing in production and marketing (Lynch & Jin, 2016). Kara and Fırat (2018) stated that specialization, a characteristic of concentration, creates an opportunity for the business to excel in its product line, earning it a competitive advantage in the process.

Researchers have also explored the challenges associated with the concentration strategy. In a qualitative study conducted to examine the potential of global expansion strategies concerning current market dynamics, Wang et al. (2018) discovered that expansion by concentration tends to curtain diversification. In this context, the definition of diversification is the business process varying its field of operation or product range (Wentrup & Ström, 2019). Businesses that fail to diversify increase their risk and resilience to unwanted and non-favorable market forces in their host countries.

Strategic Partnerships. The idea of partnerships as a strategic global expansion option has been explored widely from various theoretical perspectives. Two businesses form a strategic partnership when each one has one or more assets or expertise that can help the other by enhancing their business (Kaur et al., 2019). However, this definition of a strategic partnership is short of the other business's returns upon helping the other to enhance itself. Schiuma and Carlucci (2019) shared their dissatisfaction with Kaur's incomplete definition and her colleagues' strategic partnership. According to Schiuma and Carlucci, a strategic partnership entails an arrangement between two businesses to develop a mutual plan to help them achieve the things they have outlined in their strategic goals and objectives. According to Henderson (2016), SMEs' ability to survive in highly competitive business environments characteristic of some international markets depends on their ability to develop and pursue appropriate competitive strategies. The author cited strategic partnerships as one of such options available for SMEs.

Researchers have widely explored the popularity of strategic partnerships to conduct business overseas. According to Schiuma and Carlucci (2019), strategic partnering has become increasingly popular in penetrating overseas markets. Henderson (2016) suggested that a more significant percentage of companies choose strategic partnering as an ideal way to enhance the internationalization process's speed and improve their competitive advantage. Millar et al. (2015) also noted the increasing popularity of strategic partnerships in global business alliances. He concluded that such partnerships are widespread because businesses who survive them gain significant access to the other company's knowledge and operational resources; they form partnerships.

Critical reasons for strategic partnerships' popularity include forming economies of scale and enhancing competitiveness. Additionally, strategic partnerships help divide risks and set new standards for technology (Millar et al., 2015). Partnerships generate considerable economies of scale that enable the participating companies to consolidate and coordinate a wide range of resources to achieve SME success's critical mass (Henderson, 2016). Two or more companies with complementary skills tend to rely on each other's proven expertise instead of spending resources and time to develop an already existing product line. Foskett (2017), on the other hand, indicated that strategic partnerships help companies eliminate the hurdles associated with entering new markets and overcome the high level of competition in such markets. The popularity of strategic partnerships cuts across six dimensions.

While strategic partnerships allow companies to improve their competitiveness, earn a competitive advantage, cushion themselves against established competitors, set new standards and enter new markets quickly, there is considerable documentation of challenges and deficiencies associated with this strategy (Sung et al., 2017). Foskett (2017) identified market insulation fear as a significant challenge in strategic partnerships and alliances. He posited a substantial fear of market insulation due to the presence of a local investor.

In addition to market insulation, global partnerships suffer from less efficient communication and low resource allocation. Millar et al. (2015) posited that organizations with two different cultures and operational frameworks might not achieve a uniform communication framework, given the other operational frameworks and associate cultures they might have. Additionally, Millar et al. indicated that there is difficulty keeping objectives on target over a particular time framework if companies form strategic partnerships and alliances. On the other hand, Henderson (2016) mentioned that companies that form strategic partnerships suffer from a considerable loss over critical issues, including the quality of the product, operational costs, and employees (Baloh et al., 2018).

Researchers have also explored possible remedies to the challenges associated with strategic partnerships. For instance, Millar et al. (2015) developed a metaheuristic mathematical model to solve the constant manufacturing waste prevalent in companies forming global strategic partnerships. Millar and colleagues used variables such as communication, coordination, trust, and resource allocation to develop an algorithm that solves the waste problems by addressing the factors contributing to the waste. Devlin and Bleackley (2017) also explored the possible solution to the issues associated with strategic global alliances. According to the author, SMEs can address the challenges related to strategic international partnerships through comprehensive research conducted by the SME to go to the desired market.

Product/Service Strategy. Product/service strategy is a common topic in business literature, mainly in marketing and research. Frambach et al. (2017) defined product strategy as a series of steps that offer suitable consumer goods and services to the desired target audience. Opresnik et al. (2017), on the other hand, defined product strategy as a combination of procedures and steps outlined to clarify how the consumers in the targeted international market will receive a product or service. These include defining what sets the company apart from its competitors and outlining the fundamental tenets that differentiate the product from others in the targeted market.

Product/service strategy is considered one of the most challenging strategies for proper implementation. Most businesses that expand globally fail to get this concept right

(Lahy et al., 2018). In a study to determine the cause of business failures in global markets, Huang and Rust (2017) outlined poor product/service strategy as one of the primary contributors to such losses. Opresnik et al. (2017) supported these findings. They posited that businesses often fail to get the product's pricing, location, quantity, and branding right for foreign markets. However, Huang and Rust viewed the challenges behind product/service strategy differently. For him, innovation plays a crucial role in determining the success of the product/service strategy. Therefore, the design is pivotal to the product/service strategy's successes and failures in determining global expansion.

Tsai (2017) attempted to address the challenges linked to product/service strategy as a global expansion initiative. The author suggested that investors should considerably cut their time to market. The author said that the product's development stage should be short of guaranteeing businesses the space they need to capitalize on everything, including being the first to the market and satisfying the seasonal demands that might arise before completing the product. However, Opresnik et al. (2017) noted that the urge to reduce the time taken in a product or service development phase allowed opportunities to skip critical development stages responsible for producing the key results. As such, Opresnik noted that the quality of the work would decline in the process. Sacrificing quality for speedy is risky and completely unnecessary when penetrating a new market (Harrigan, 2017). According to the proposal by Opresnik et al., creativity tends to drive innovation. The beginning of product development often encompasses big and small ideas. In addition to ideation, researchers have explored the concept of product pricing to solve the challenges associated with product/service strategy (López-Cózar-Navarro et al., 2017). Product pricing encompasses developing the value of a product upon development while considering both internal and external factors that might have impacted the cost of production and individuals' purchasing power and habits in the targeted market (Tsai, 2017). Tsai acknowledged that product pricing is crucial in eliminating negative public image and profit maximization.

Market Research. Market research is considered a broader perspective of the global business expansion strategy matrix. Businesses consider it a primary factor when exploring new territories away from domestic variants (Dang et al., 2020). Sousa-Zomer and Miguel (2018) explored the importance of market research as an expansion strategy. They note that SMEs should comprehensively analyze the markets to learn about competitors' products and develop countermeasures to address the competition. Market research, however, involves more than just studying competitors (Perker, 2020). It consists of looking into macro and microeconomic factors that likely impact the business's overall success by establishing an operational base in the country where it has not operated before.

Macro and Micro Economic Factors

Researchers have studied the macro and microeconomic factors that impact the business's potential success. Researchers acknowledge that each region and country have different micro and macro-economic factors (Gao et al., 2017; Mertens et al., 2019; Witkowski et al., 2017). Businesses that want to expand globally must evaluate these factors to achieve the desired level of success while operating outside of their typical environment (Buckley et al., 2017).

In international markets, a business's performance depends on several factors. Every entity that operates in a particular setting is categorized into micro and macro environments. Conversely, Xuhua et al. (2016) noted that the macroenvironment relates to the entire economy and its effect on business entities' operations. Therefore, such factors are beyond the control of a business and may include technological and demographic elements. Evaluating micro and macro environmental factors is critical to understanding their influence on businesses' performance in the international market (Watson et al., 2018).

Micro-Environmental Factors. Micro-environmental factors refer to the factors in a company's immediate environment that affect its overall performance. The micro-environmental factors also affect business decision-making (Dragnić, 2014) and include employees' availability, distribution channels, level of competition, media, and investors' availability.

Availability of Employees. Employees' availability is a critical factor as the staff of a business determines the production and sales output. Employees are responsible for selling, fabricating, and servicing goods vital to driving business (Yang, 2018). Dragnić (2014) stated that an entity with motivated, creative, and qualified employees would achieve higher success. Conversely, Xuhua et al. (2016) concluded that a company with an inadequate labor force or unskilled staff for technical jobs could suffer adverse consequences. SME owners should endeavor to retain a skilled labor force with the necessary vital competencies (Xuhua et al., 2016).

Distribution Channels. Distribution channels are critical factors in determining the efficiency of sourcing goods from suppliers and distributing the inventory to customers. Abebe (2017) mentioned that these channels present vital links in the value delivery process and act as price determinants. Additionally, Ibrahim and Primiana (2015) noted that a business must have streamlined processes to access quality products from suppliers and offer its customers excellent value and accessible solutions to operate efficiently. With an efficient distribution channel, a company can maximize its profits (Tenzer et al., 2017).

Level of Competition. The scope of a business's challenge influences its income and long-term viability. An industry with minimal competition could indicate that demand for particular products is low; hence the firm may not succeed in the long run. In contrast, Tabetando (2018) noted that many competitors depict a high demand for services and products. Dragnić (2014) mentioned that firms should also focus on other rivalry aspects, such as desire, brand, and product from the competition. Such an understanding could help develop a sustainable competitive advantage to thrive in the given industry.

Media and General Public. The local community where a business operates and its portrayal in the media determines its image, impacting its overall performance. Seo and Lee (2019) argued that a company must evaluate the public's view of a particular step before implementation. Businesses should ensure their actions appease the public and are in their best interest. Barbu and Orzan (2012) discovered that social and environmental duties and job provisions could enhance a company's image. Generally, public opinion is a critical success determinant; hence, firms should maintain a positive impression (Wu & Gereffi, 2018).

Availability of Investors. Investors are essential in starting a business or when seeking to expand it. Pîndiche and Ionita (2013) indicated that a company is likely to fail; it lacks funds to build and grow. Reliance on creditors would mean paying back loans with a higher interest, hence cutting back on returns. Conversely, Xuhua et al. (2016) reasoned that a firm could increase its expenditure on the different departments with willing investors. Such shareholders could also offer valuable expertise and support critical for growth (Raghunath & Rose, 2016). Businesses should, therefore, develop strategies to attract and retain investors.

Impact of Micro-Environmental Factors. Micro-environmental factors can positively impact a business's performance in an international market. Dragnić (2014) mentioned that firms located in areas with a large pool of skilled labor force would have creative and competent employees, enabling them to thrive. Additionally, Rizal et al. (2017) suggested that if a company maintains a positive public outlook, the target customers will be more supportive of its activities. Streamlined distribution channels among suppliers, businesses, and customers can improve the value of sold products and services, leading to improved profitability. Moreover, Abebe (2017) speculated that investors are readily available; hence a firm could quickly access the necessary support for its growth. Therefore, internal factors can help a business thrive in international markets.

Nevertheless, micro factors could adversely affect a company's performance. Xuhua et al. (2016) suggested that if the competition level is relatively low, the business could encounter limited demand for its products and services, in the long run, translating to low profits. Abebe (2017) posited that investors could hesitate to channel their resources to businesses in some countries, limiting their growth and expansion. Furthermore, Ibrahim and Primiana (2015) noted that getting qualified personnel in some regions could be challenging. A business would then need to work with unqualified staff, which leads to reduced productivity (Crespo et al., 2020). Companies should thus consider likely adverse micro-factors before entering an international market.

Macro-Environmental Factors. A macro environment is an existing business scenario or condition in the entire economy instead of the business itself or a particular sector. Macro-environmental factors affect business growth, success, and decision-making (Hopkins, 2015). Macro-environmental factors include demographic, technological, natural, physical, political, social, and cultural characteristics (Tabetando, 2018).

***Demographic Forces*.** These forces include age, lifestyle, and education level of the community where a business operates. Seo and Lee (2019) noted that people are the primary driving factor in business development. If a firm operates in an area with highly educated and high-income individuals, its offerings must match its wants for the company to thrive. Conversely, Hopkins (2015) suggested that a business must evaluate innate demographic aspects to determine the best marketing strategy. Understanding the distinctive characteristics of a society is critical to formulating a suitable plan for business success.

Technological Factors. With constantly changing technology, businesses must keep up with such shifts. Birnleitner and Student (2013) held that a firm could use several technological developments to improve its products and techniques besides enhancing manufacturing processes. With up-to-date skills and equipment, a business run effectively. Nonetheless, Tabetando (2018) disagreed, stating that technology could risk firms when it becomes obsolete. Firms must, therefore, seek to adopt the most recent technologies.

Natural and Physical Forces. The impact of these forces is primarily common among manufacturing and production firms. Birnleitner and Student (2013) mentioned that global warming had affected rainfall patterns, leading to crop-related raw materials shortages such as cotton. Rizal et al. (2017) noted that environmental pollution concerns have risen in recent years, leading to increased government intervention. It has become critical for businesses to adopt sustainability approaches, such as using renewable resources, to reduce the adverse impacts of such forces (Birnleitner & Student, 2013). Therefore, ecological forces have become an essential factor to consider for companies.

Political Forces. The political environment includes laws, pressure groups, import and export laws, and government agencies restricting business practices in a particular region. Rizal et al. (2017) suggested that every firm should update these forces to make the right choices. Before entering a foreign country, it is critical to consider the rules a business must follow. Ibrahim and Primiana (2015) held that a firm must evaluate the legislation that affects its operations and any regulations limiting its potential, such as environmental laws. An in-depth analysis of the political environment is critical to determine its viability in the given area.

Social and Cultural Factors. The culture and social values of a group have a considerable influence on a business. Pîndiche and Ionita (2013) indicated that culture dictates the interpretation of certain symbols and the view of various products and marketing approaches. Companies must analyze the group's beliefs and values when establishing in a foreign area. Such evaluations help avoid actions that could negatively impact their culture, hence sustaining a positive impression.

Impact of Macro-Environmental Factors. Macro factors have several positive effects on the performance of firms in the international market. Abebe (2017) posited that a business could thrive in counties where the government offers tax holidays to foreign investors and maintain a peaceful environment. Besides, Abebe claimed that if the target country is well endowed technologically, a business could streamline its processes and offer quality goods and services to customers. Birnleitner and Student (2013) indicated that understanding a country's social norms and values can help select the right signs in products and appropriate marketing approaches, leading to increased business acceptance. Moreover, Xuhua et al. (2016) postulated that situating a firm in a country with the required physical and natural resources can help lower production costs and increase profitability. With such conditions, business thrives in the international markets.

Nonetheless, macro factors can have several adverse influences. In nations where the government has strict laws on environmental protection, it could limit its growth potential. Besides, Hopkins (2015) indicated that if a business can only access obsolete technologies, its performance could face significant threats, compromising profitability. Operating a business in countries nearing elections and where political violence is rampant could be unsafe. Seo and Lee (2019) argued that stringent policies and legislation could significantly threaten the firm's smooth running. It is critical to evaluate the impact of these factors before opening a company in a foreign nation.

Significance of Digitization

Researchers acknowledge the increasing significance of digitization when analyzing the applicability of Porter's five forces model. Digitization brings in two more forces that businesses should consider when moving to new industries (Bruijl, 2018), which significantly determine the level of competition and associated competitive advantage. The two more forces are globalization and deregulation. The impact of globalization is evident even when Porter's five forces are eliminated (Lambert & Enz, 2015). Almost every area within a company could feel the effects of globalization. Fabian (2015) noted that government regulations have eased in the past decades, especially in Europe and the United States. Lambert and Enz (2015) assessed the impact of globalization on the industry structure. They mentioned that globalization affects the size and potential of the market. There is the possibility of having a more significant number of competitors, suppliers, and partners. The other proposed effect by Bang and Markeset (2015) was the location effect. The location effect includes outsourcing, offshoring, and complex supply chains. They also talked about the pressure effect. The pressure effect consists of the pressures caused by costs and prices, a high rate of change, a more diverse market, lower visibility, and reduced start-up barriers.

There are several future trends in globalization for business. Firms will face increased and more complex uncertainties in the value chain. Lund et al. (2019) posited that such developments would necessitate firms to be more flexible and enhance their overall resilience. Global operations' risks and costs are gradually shifting, and businesses must establish the ideal place to compete along the value chain (Verbeke et al., 2018). With globalization, firms must re-evaluate their geographic footprint and consider new product and service offerings. Most businesses will localize their supply chains to enhance coordination (Verbeke et al., 2018). Additionally, companies will shift from keeping all sellers close to fostering collaborative bonds with core suppliers to counter better the more complex unknowns (Lund et al., 2019).

Additionally, cross-border services will grow faster than the trade in goods. While the quantity of goods exported to different nations is likely to reduce, the sale of services across countries will increase (Verbeke et al., 2018). Besides, services generate higher economic value, considering the increased use of digital services globally, value-added services, and the intangibles that firms send to foreign affiliates (Lund et al., 2019). Subsequently, businesses in the service industry are likely to benefit significantly from the increased sale of their intangible products across borders. In contrast, companies dealing in goods will shift toward establishing production close to demand to maximize returns while reducing operational costs (Verbeke et al., 2018).

Furthermore, empowering the workforce will present a significant change, particularly in their engagement and productivity. Companies will increasingly adopt borderless working aids across borders, enhancing individuals' agility and flexibility (Chaudhary & Joshi, 2016). Verbeke et al. (2018) noted that there would be considerable developments in the digital office with intelligent communication running the future business, leading to enhanced efficiency in operations. Companies will also increase automation to reduce labor costs and promote efficacy (Verbeke et al., 2018). It is paramount for businesses to be well prepared for such trends to quickly adapt to enhance their sustainability in the changing global business environment.

Summary of Literature Review

The literature review brings into perspective a vast source of knowledge that sufficiently covers a wide range of topics in the area of global expansion. The literature review explores past research on globalization and global expansion to determine why companies go global. These include the perceived potential for improved performance and profitability, the desire to expand brand knowledge and gain first-mover advantage, and an unfriendly domestic market. This literature review highlights the various impact of global expansion on SMEs. These include the risks of significant reputational damage, severe losses from unpredictable market dynamics, and costly laws and regulations for businesses to achieve compliance. Cultural beliefs also have caused a significant challenge to multinational firms that expand globally. Literature has explored global business strategy and its integration with the internal business process and laid-down control mechanisms. Small businesses' strategies include international, global, strategic partnerships, product/service, and expansion through concentration.

In this literature review, I also acknowledge that macro and micro environmental factors affect businesses that operate in foreign markets. Microenvironmental factors such as employees' availability, distribution channels, competition level, media, the general public, and investors' availability determine how small businesses will succeed in foreign markets. Macro environmental factors such as demographic, political, socio-cultural, and technological factors impact small businesses' overall operations in the international markets. Porter's five forces model is widely applicable in understanding the factors that are likely to affect the success of businesses in the international markets. Researchers have expressed concern over Porter's five forces model's relevance to the current business environment. Porter's model's key characteristics are widespread inclusion of technology without prescribing the principle of operations.

Transition

In Section 1, I presented the background of the problem, the problem statement, the purpose statement, the significance of the study, and the nature of the study, which justified the reason for using a qualitative method and a multiple case study design. Section 1 also comprised the research and interview questions, conceptual framework, academic literature, assumptions, limitations, and delimitations of the study.

Section 2 includes the business problem, which covers the purpose, the role of the researcher, the participants, the research design and methodology, the population and sampling, data collection and analysis, and reliability and validity. I also address the processes for ensuring conducting of an ethical study.

Section 3 covers the introduction, summary of findings, and conclusion. I discuss the application to professional practice, the implications for positive social change, the recommendations for action and further study, and the researcher's reflections.

Section 2: The Project

In section 1, my focus was on the selected conceptual framework and the literature review. This section includes the purpose statement, the participants, and the research method and design. I also covered the population and sampling method in this section, the basis for ethical research, the data collection instruments and techniques, the data organization techniques and analyses, and the reliability and validity of the study.

Purpose Statement

The purpose of this qualitative multiple-case study was to explore the strategies that small retail business owners use to improve their profitability opportunities through global expansion. The target population comprised five owners of small retail businesses in the United States who have successfully implemented strategies to improve profitability through global expansion. The implications for positive social change include the potential to identify the strategies that facilitate the integration of the small retail business into the international market and develop the small business sector. The global expansion of small businesses can enable societies to purchase cheaper goods, increase trade, and enhance international economic participation. The success of small businesses can also lead to economic growth and poverty alleviation, enabling greater community development by increasing tax revenues.

Role of the Researcher

Researchers play an essential role in determining the overall quality of the research. They are critical in the research process since their used techniques and adopted approaches during interpretation are crucial for assessing the level of biases in the study (Whiteley, 2012).

Researcher's Role and Relationship With The Topic and Participants

In qualitative research, the primary role of the researcher is to get data from participants and appropriate resources. Researchers collect data through interviews, observations, recording notes, or reflecting on event participation (Onwuegbuzie et al., 2010). The researcher's role is to examine data descriptively to observe categories, patterns, and themes.

My role in this qualitative research was to design the study methodology, facilitate communication flow, set participants at ease, and be the data collection instrument. I created the research interview guide, contacted the participants, collected data through interviews, and analyzed the results. I identified themes from the data patterns and presented the results.

I recognize the challenges affecting small businesses in expanding their business internationally due to my business administration background, management experience, and working as a consultant with some small firms. I selected participants from the retail industry in the Northeast region of the United States that I did not have a personal relationship.

Researcher's Role Related to Ethics and The Belmont Report Protocol

The *Belmont Report* includes guidelines for involving vulnerable research participants, protection against the abuse of participants without consent, protection of people with mental challenges, and vulnerability from unfair research (Rogers & Lange, 2013). To align with the *Belmont Report* guideline protocol, I eliminated vulnerable humans from my participants' list and assured them that their identities would be strictly confidential. According to Elliott et al. (2011), focused sampling is helpful to researchers for in-depth studies. Also, I complied with the standards of the Walden University institutional review board (IRB) to apply ethical standards and federal regulations.

Researcher's Role in Mitigating Bias

Bias mitigation is a crucial challenge for qualitative researchers. Researchers need to validate the quality of their interview protocol to avoid possible researcher biases (Platt & Skowron, 2013). I used a standardized interview protocol to increase reliability since the same questions usually deliver reliable answers. I employed an interviewing-the-investigator technique to mitigate biases. In interviewing the investigator technique, the researcher presumes one of the participant's roles and recruits a partner to conduct the interview. The investigator can play both the role of the interviewer and interviewee (Chenail, 2011). Upon the interview completion, the participants can decide to repeat the process until the results are satisfactory. I taped the interviews, applied methodological triangulation, and used a random numeric code for each participant.

Researchers can enable participants to share data regarding their experiences and facilitate communication by applying the interview protocol (Whiteley, 2012). Following the interview protocol allow scholars to keep interviews focused on the desired information and collect more data (Jamshed, 2014). I acted as a discovery research instrument and constructed a specific set of open-ended questions to allow each participant to contribute their perspective.

Participants

Before collecting data, a scholar must select participants whose characteristics align with the main research question (Schrag, 2017). I used the participant’s eligibility criteria to help choose experienced participants who can furnish relevant and valuable data. The participants of this study included five small retail business owners in the Northeast region of the United States who have successfully implemented strategies to improve profitability. The eligibility criteria for the participants included (a) the participants are the owners of internationally expanded SME businesses, (b) profitable small businesses, and (c) the small business businesses in the Northeast region of the United States. I requested the Walden Institutional Review Board (IRB) approval to ensure I followed the ethical guidelines and avoided human rights violations.

The relationship with the participants is essential for the success of a qualitative study (Chan et al., 2017). Personal and professional networking was my strategy for gaining access to the potential participants of the study. I searched for potential business participants from an online business directory. I then reached them, explaining the study's intent, including the research participant's informed consent form, and confirming their willingness to participate. I also asked some selected participants to recommend other business owners in their region. Moreover, I developed guidelines to ensure participants' protection.

Establishing a working relationship with the participants requires engagement and trust. Interaction and communication with the participants are crucial for creating trust and mutual responsiveness (Jarvik et al., 2014). I strengthened my working relationship with the participants by networking with them on social networking sites and constantly assuring them of their anonymity and the confidentiality of their data to prevent them from holding back vital information. To maintain a working relationship with the participants, I need to be genteel and respect their choices and decisions. Institutional Review Board (IRB) approval needs to be granted before contacting participants (Morris & Morris, 2016). I also collaborated with the participants, maintained an excellent interactive relationship, and demonstrated exceptional communication and organizational skills throughout the interview process to ensure proper working relationships. I ensured that the participants fully understood their rights and role in the study.

Research Method and Design

Research Method

Quantitative, qualitative, and mixed methods are scholarly research methods. The qualitative research method was appropriate for this study since it is more flexible than quantitative research and allows researchers to understand the phenomena (Lach, 2014). This research is proper for the qualitative method because it allows for the subjective experience of the research participants. The advantage of using a qualitative approach is reducing research costs using small sample sizes (Venkatesh et al., 2013).

The rich and deep data structure combined with detailed descriptions of participants in this study are not amenable to logarithmic transformation or analysis. Scholars in the quantitative method use many participants, test hypotheses, and statistical instruments to explain the phenomenon (Allwood, 2012). The purpose of this study was to explore business strategies that small retail business owners use to expand their business internationally. The quantitative method is unsuitable for delivering reliable lived experience information (Giorgi, 2017).

The mixed-method approach combines quantitative and qualitative methods (Adil et al., 2014), which was not proper for this study as the study's objective was to identify, assess, uncover, and understand a business phenomenon with no emphasis on statistical measurements. The in-depth data collection process and the enormous amount of time involved with using the mixed method made the mixed method unsuitable for conducting my study.

Research Design

Research design is the framework that links the research components to draw conclusions in a study. I considered four qualitative research designs: case study, grounded theory, phenomenology, and ethnography. It is crucial for scholars to select the research design that will enable them to address the research question(s) (Marshall & Rossman, 2016). All elements of the research designs for this study are from the purpose of the study, which is to explore the strategies that small retail business owners use to improve their profitability opportunities through global expansion. The preferred research design was a case study. A case study is the most appropriate design to explore the organizational experiences in a real-life setting with an in-depth exploration (Schmidt et al., 2018). Scholars use case study design to explore situations with no single definite set of outcomes from the intervention under evaluation and when they cannot manipulate consistent behavior (Yin, 2017). Using a case study requires analyzing the data by looking for themes to understand the phenomenon (Haines, 2017). Scholars design multiple case studies to generalize conclusions over several units to understand the case's similarities and differences. Single-case studies can provide a viable alternative to extensive group studies (Gustafsson, 2017). Researchers need to understand the philosophical and methodological foundations that guide the process.

The justification for using case study design is that case study design consists of rich data which researchers use to study a real-life phenomenon and have an in-depth understanding of the phenomenon's nature and complexity (Lewis, 2015). A multiple case study was the appropriate research design for this study because it supports an in-depth exploration of small business owners' strategies to expand their businesses. Defining global expansion strategies for small businesses requires analyzing and synthesizing the similarities, differences, and patterns across multiple cases (Cacheche et al., 2015).

Researchers favor case study design when asking how or why questions because it could trace operational links over time rather than simple occurrences (Yin, 2017). Using the phenomenological research design, researchers study the meaning of lived experiences of a group of people around a specific phenomenon (Korstjens & Moser, 2017). However, the phenomenological design approach was unsuitable for this study as it is better suited for exploring lived experiences, and scholars can not use multiple data collection sources like case studies (Conway & Elphinstone, 2017). This study did not aim to study individuals’ lives by gathering data by collecting their stories. Ethnography is the study of shared behaviors, beliefs, and language of a cultural group in the field for a long time (Bristowe et al., 2015). The ethnographic design was unsuitable for this research since it involves engaging in the participants' daily activities. My intent for this study was not to commit to conducting long-term research onsite for an extended period. The grounded theory design includes initiating new theories beyond the descriptions of individuals' lived experiences. It is only appropriate when a researcher generates a theory grounded in the collected data (Marshall & Rossman, 2016). The grounded theory did not apply to this study because my goal was not to discover new theories or understand the studied groups' essence.

In this research study, I explored the strategies that small business owners need to expand their business globally, which was not concerned with an individual's life story. I did not explore individuals' lived experiences or study the culture of specific groups. As a result, none of the grounded theory, phenomenology, and ethnography research designs were suitable for my research. I did not need answers to how, what, or why questions to understand real-life phenomena and behaviors, which made an exploratory case study the appropriate design.

Data saturation occurs when no new information or themes are observable in data collection (Tran et al., 2017). Scholars achieve data saturation when explaining the relationships between the codes and the themes emerging from the data. Failure to reach data saturation affects the validity and quality of research (Hennink et al., 2017). To achieve data saturation, I ensured that participants responded to all questions in detail, paid attention to participant responses, and stopped data collection when the answers became repetitive.

Population and Sampling

This study's target population was five business owners of small retail businesses in the Northeast region of the United States who successfully expanded their business internationally. I selected the business that allows interviews with the owners. The selection process included contacting the local chapter of Business Networking International (BNI) companies. I used the purposive sampling approach since it focuses on a characteristic of the small business population and explores that quality by applying critical case research to help explain the phenomenon. Purposeful sampling guarantees that the scholar recruits people relevant to the study topic (Schrag, 2017). The participants' eligibility criteria were: (a) small business owners in the retailing sector, (b) founded in the United States, and (c) successfully expanded internationally.

Lacking accurate sample size information may hurt the creditability of research conclusions (Lu et al., 2017). Unnecessarily large samples size can raise ethical concerns in a study (Rafail, 2018). Purposeful sampling enables scholars to select participants based on the participants' expertise and knowledge (Dorney, 2016). Therefore, purposeful sampling is a logical and powerful tool to help choose information-rich research cases. For qualitative research, the sample size is needed only to answer the research question in-depth and with extensive information (Dorney, 2016). The research sample size depends on the nature of the study, data saturation, and the researcher's experience (Hennink et al., 2017). As stated in the purpose statement, the target population for this study comprised five owners of a small retail business in the Northeast region of the United States who had successfully implemented strategies to improve profitability through global expansion. The participants' population met the selection criteria, had demonstrated success in improving profitability opportunities through global expansion, and aligned with the purpose statement, which allowed answering the research question. Each participant provided rich and valuable information. This sample size was sufficient to achieve data saturation and validate the results.

The depth of information collected rather than the sample size determines data saturation (Constantinou et al., 2017). Researchers should keep collecting data until there is no new information or themes to emphasize a study's validity and reliability (Hennink et al., 2017). To achieve qualitative research standards, I continued to interview participants until no new information emerged and used a member-checking strategy. If I could not achieve data saturation, I would involve additional owners of small retail businesses or include small business owners from different regions that meet the selection criteria. For the interview setting, I selected a convenient and comfortable setting for the interview, which did not last more than 60 minutes.

Ethical Research

There is a relationship between decent corporate overseeing and ethical behavior, so it is crucial to follow Walden's Institutional Review Board's (IRB) policies to protect participants' rights. The IRB framework helps define the study procedures and offers ethical guidance before proceeding with the research (Wittenberg & Elings, 2017). During the data collection process, I followed the Belmont Report (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research), which provides ethical principles and guidelines to respect individuals, beneficence, and justice.

Using fundamental principles that require agreement among the researchers is recommended, as specific rules could become outdated (Nusbaum et al., 2017). I followed an interview protocol (Appendix A). The participants received an invitation via email, including a list of the questions (Appendix B) and the consent form. The consent form included the aim of the study, procedures, nature of the study, participant rights to withdraw at any time, risks and benefits of participating, payment, and other pertinent information needed to make an informed consent.

Participation in the study was voluntary, so I respected the participant's right to withdraw at any time. There were no incentives, compensation, or consequences for refusal or withdrawal. For the participants who decided to withdraw, I removed all related data upon receiving the notice and interviewed additional participants until I achieved data saturation.

I obtained a consent form to record the interviews, provided a copy of the participants' transcripts to check their accuracy, and retained a signed copy in the study records. To protect the participants' and organizations' privacy, I masked their identities and did not use their information for any purposes outside this research. Also, I did not include their names, identifiers, or any recognizable information in the published study reports to maintain confidentiality. I used a random numeric code and removed identifiers from the research documents to distinguish participants. Moreover, I saved the interview audio files, corresponding transcriptions, and the outcomes into a password-protected file on a USB drive in a safety box for 5 years; then, I will destroy them per Walden's requirements after completing the study.

Data Collection Instruments

In qualitative studies, the researcher plays a crucial role in data collection and understanding the themes that arise from data collection (Kozleski, 2017). I was the primary data collection instrument for this case study. Semi-structured interviews are a popular tool for acquiring meaningful insights from the participants for qualitative studies (Taylor et al., 2017). I used semistructured interviews and company documents to obtain in-depth knowledge and collect thick data. The interview process involved open-ended questions to identify small retail business owners' strategies to expand their business globally. I used a digital voice recorder tool to record the interviews due to the software's ability to compress extensive data into a single file. Beyond the acquired interview information, I collected and analyzed data from the company's documents, such as administrative artifacts and financial reports to supplement evidence from other sources.

I followed the best practices to enhance the reliability and validity of the data collection process. Transcript review allows scholars to check for accuracy (Teixeira et al., 2017). To confirm that the interpretation reflected the participant's experiences, I used the member-checking technique by presenting the summarized transcripts to the interviewee to guarantee that they reflected their experiences. Also, I followed the interview protocol (Appendix A) to ensure the consistency of the interview process for all participants. Moreover, using methodological triangulation enables scholars to confirm the accuracy of the collected data from different sources (Yin, 2017). To perform proper methodological triangulation guidelines, I used various sources to collect data, including interviews and the company's documents.

Data Collection Technique

The data's depth and quality are the highest consideration in qualitative data collection. The data collection technique for this paper consisted of semistructured interviews and company documents. I followed the interview protocol to interview small business owners (Appendix A). Researchers use one of the three interview types: structured, unstructured, and semistructured (Bondy & Starkey, 2012). Adopting the structured interview technique enables scholars to reach a wide-ranging sample of participants to collect quantifiable data without allowing participants to explore questions in detail (Doll, 2017). The unstructured interview is an informal open-end interview in a free-flow conversation without format questions (McTat & Leffler, 2017). Still, they are more time-consuming, and there is a chance of getting diverted from the topic (McIntosh & Morse, 2015). Semi-structured interviews allow in-depth questions and provide a framework for understanding participants' attitudes (McTat & Leffler, 2017). Participants may feel more comfortable answering questions with a well-designed protocol (Bondy & Starkey, 2012). During interviews, researchers need to mitigate potential bias (Arshed, 2017). To improve the data collection process's integrity, scholars must share the research design details, data collection protocols, and detailed data analysis explanations (Barrios et al., 2017). Abbreviating, paraphrasing, or incorrectly contextualizing the participants' responses threatens the validity of the collected data (Yin, 2017).

I started the data collection process for this case study after receiving IRB approval. The participant received a list of the interview questions (Appendix B) and the consent form. Upon completing the interview, I employed a transcript review, which included recording and providing a copy of the transcripts to the participant to ensure data accuracy. Member checking allowed following up with the participants to clarify or develop any thoughts that could strengthen the results (Castillo-Montoya, 2016). Member checking is a quality control process that enhances the interview's credibility and validity to capture the participant's responses (Taylor et al., 2017).

In addition to the interview, I reviewed the company's published material, which provided additional organizational context to address the research question and support the methodological triangulation of this study's findings. Methodological triangulation helped scholars to establish credibility and strengthen insights by combining multiple phenomena perspectives (Yin, 2017). I performed methodological triangulation unbiasedly by evaluating the collected date from the interviews and available documents using a software system to code the results and implement an interpretive.

Data Organization Technique

Scholars use accurate data organization techniques to improve the study's objectivity and are essential for accurately analyzing, reviewing, and reporting interview data (Vicary et al., 2017). Converting the raw data into transcripts for this study occurred in Microsoft Word. I used NVivo to identify the codes and themes in the transcripts. NVivo software is advocated for qualitative data management and analysis as it directly presents the advantages of recording and categorizing themes from raw data (Woods et al., 2016). I uploaded the collected data on NVivo software to organize the interview results into different themes. Then I analyzed the information from the content using thematic techniques.

Codes and themes are common expressions, concepts, and practices for qualitative studies (Bishop & Kuula-Luumi, 2017). Using codes instead of names will help to protect the engaged participants and organizations. Data coding will include labeling words and phrases found in the transcripts and identifying patterns that generate themes (Watkins, 2017). I stored the electronic records with a password. I maintained the data in the locked cabinet for 5 years and wiped out the information.

Data Analysis

In this multiple qualitative case study, I explored small retail business owners' strategies to improve their profitability opportunities through global expansion. Bernard and Ryan (2016) described data analysis in qualitative studies as investigating data patterns and using analytical techniques to illustrate and assess data. Researchers use triangulation to confirm the data collected is complete (Fusch & Ness, 2015), enhance validity, and maximize the depth of the study (Hayashi et al., 2019). The four types of triangulation techniques are: data triangulation for correlating people, time, and space; investigator triangulation for relating the findings from multiple researchers in a study; theory triangulation for using and corresponding multiple theoretical strategies; and methodological triangulation for connecting data from various data collection methods and mitigate bias (Fusch et al., 2017). I employed the methodological triangulation technique for this case study to compare and validate data from the interviews and the company's published documents. I performed member checks and completed the analysis of emerging themes until achieving data saturation.

I analyzed the data using the five-phased cycle of data analysis proposed by Yin (2018), which is (a) compiling data, (b) disassembling, (c) reassembling, (d) interpreting the information, and (e) concluding. To achieve Yin’s data analysis approach, I transcribed interviews, reviewed the transcribed notes, coded the data by arranging it into manageable themes, reviewed the published records, and explained the case study's meaning. I employed the member-checking method to confirm the interpretations' accuracy and allowed participants to be part of the data analysis by validating the collected data. Uploading the data to the NVivo software programs helped me search and identify themes.

I used CAQDAS- NVivo 12 Pro software, which includes the high compatibility of the software to research designs and is easy to use. Scholars can analyze open-ended responses to interview questions and reflective writings using the NVivo software (Feng & Behar-Horenstein, 2019). NVivo functionalities include transcribing, combining, and coding different data forms (Maher et al., 2018). I used NVivo to focus on critical themes, conceptual framework, coding, word frequencies, emerging themes, and data interpretation.

Themes are the affirmations of visible patterns recognizable through the analysis of transcribed interview data elements (Hennink et al., 2017). It is essential to examine to find similarities, differences, common themes, and the meaning of information (Yin, 2017). I reviewed the collected data through the conceptual framework lens to conduct a thematic analysis. I used thematic analysis and methodological triangulation to correlate key themes with the literature. The thematic analysis approach for qualitative data involves finding, interpreting, and reporting patterns within the data (Haven & Van Grootel, 2019). NVivo software simplified identifying themes and pattern recognition within the data analysis process, including placing data in different categories, matching categories with sources of evidence, and creating flowcharts (Yin, 2017). According to Yin (2017), a researcher uses coding to uncover themes contained within transcripts and includes data to reach saturation to ensure reliability, validity, and creditability.

Reliability and Validity

Achieving high-quality research is challenging. Reliability and validity guarantee that study conclusions and actions do not include bias and are trustworthy for people to have confidence in the findings (Heale & Twycross, 2015). Credibility, dependability, confirmability, and transferability are used to assess the qualitative study (Kern, 2016). Validity shows the qualitative research method's ability to produce the same outcomes when repeatedly tested (Assarroudi et al., 2018). Scholars must address validity and reliability issues in their studies because the research information's accuracy, dependability, and credibility depend on it.

In this study, I used various strategies to ensure the reliability and validity of the data. I utilized an interview protocol, and member checking mitigates unreliable results. I also used concrete research techniques and detailed explanations to inform readers to improve case study accuracy. Moreover, I provided a detailed description of the data instrument and gathering processes, coding techniques and analysis, and proper presentation. I ensured the application of rigor to the data by listening, recording, transcribing interview notes, and comparing information provided by participants.

Reliability

Reliability in qualitative research means dependability and consistency (Rashid et al., 2019). Dependability refers to the finding’s stability over time (Moser & Korstjens, 2018). Procedural reliability correlates with consistency, which means that if other scholars examine the work, they should come to similar conclusions (Yin, 2018). Failure to tape-record or take notes, lack of a complete research plan, and lack of consistent documentation of case analysis may threaten procedural reliability during data collection.

Multiple observations can boost reliability, systematic data sampling and analysis, and respondent validation, where researchers show their collected data and interpretations to participants to ensure accuracy (Ramani & Mann, 2016). The research’s reliability can be accomplished by applying the case study protocols and utilizing databases to analyze the data (Damsa & Ugelvik, 2017). Therefore, I employed member checking and an interview protocol to ensure the dependability of the study findings by asking similar questions to all the participants and allowing them to authenticate my data analysis for the accuracy of the findings. Also, I reviewed published records to ensure the methodological triangulation process and the accuracy of my study. I checked the interviews and published records data to ensure no significant differences or contradictions between the two sources and eliminate any errors in the study’s coding system. Moreover, I documented the study's procedures to address the reliability of the data. Finally, I used effective data analysis software to affirm having reliable and valid results.

Validity

Validity is the ability to apply an operationalized measure to capture the underlying theoretical concepts it anticipates achieving (Bloomfield et al., 2016). Qualitative research validity refers to the appropriate tools, processes, and data for the study (Leung, 2015). Scholars can use several techniques to ensure qualitative research's validity, like credibility, transferability, and confirmability (Ramani & Mann, 2016).

A qualitative study is credible when individuals share the same experience and recognize the descriptions of human experiences (MacKenzie, 2016). Researchers achieve credibility when their study's intention reflects the participants' social reality (Maher et al., 2018). To ensure credibility, I utilized multiple sources of data collection, such as interview protocol, member checking, and methodological triangulation of data interpretation from published records. Member checking enhances the credibility and validity of the research (Dominguez & Mayrhofer, 2017). I sent the participants summarized readings of the interview findings to confirm the accurate representation of the interview responses. Applying data analysis software such as NVivo helped track assigned codes in the study. Using multiple pieces of evidence to contradict or confirm the accurate interpretation of participants' experiences can assure triangulation in qualitative research (Marshall & Rossman, 2016). I reviewed additional references to verify the evidence of interview data, including firms' official documentation and field notes.

Transferability means the ability to expand research results to more settings. Transferability represents the extent to which the findings are generalizable or transferrable to different contexts or populations (Richardson, 2018). In qualitative research, generalizability is the process of whether the research results are transferable (Maher et al., 2018). Transferability involves providing enough information regarding participants and research environments to enable readers to assess the findings for adequacy. The evidence of transferability includes using a chain of evidence, accurately recording actions, and documenting the use of assumptions in the study. (Hayashi et al., 2019). Severe threats to the transferability of qualitative research may occur when a researcher fails to reconnect the study's empirical findings to other cases and fails to explain how new evidence enhances the understanding of the research questions. Scholars must provide adequate detail of study content so the reader can determine if the findings are transferable (Castleberry & Nolen, 2018). To address transferability to future research, I described the original context of the study. I ensured the transferability of my research study by importing the interview files into NVivo for transcription, coding of themes, and analysis so that the findings accurately reflect the emergent themes and answer the research questions. I utilized the interview protocol, member checking, and methodological triangulation to ensure transferability. I included direct quotes in the findings section to demonstrate transferability.

Confirmability refers to comparing objective and accurate research findings to the researcher's biases (Nowell et al., 2017). Scholars use confirmability to evaluate a study's rigor and quality (Maher et al., 2018). Castleberry and Nolen (2018) suggested that researchers must provide evidence to allow other readers and researchers to confirm the findings. Confirmability is the level at which researchers can demonstrate the truthfulness and correctness of a study's findings. Confirmability is accomplished through member checking when the study participants provide feedback to the researcher on the analysis (Delgado-Romero et al., 2018). Member checking is a means to maintain validity in qualitative research (Candela, 2019). I followed strict procedures to ensure data accuracy and used triangulation to support findings from the interviews with multiple data sources, including companies' documents and observations. I conducted member checking and used an interview protocol to confirm the confirmability of the study findings.

Data saturation is the point at which gathering more data about a theoretical construct becomes repetitive and reveals no new data during the coding process for any of the categories (Hennink et al., 2017). Saturation occurs when the researcher decides that no new insights about the phenomenon will occur (Fisher & Bloomfield, 2019). Determining saturation requires constant assessment and analysis of the data, asking further questions if a new idea emerges to see if it holds value to someone else (Bulled, 2019). I continued interviewing participants until no new themes or information emerged to arrive at data saturation.

Transition and Summary

The Purpose of this multiple qualitative case study is to explore the strategies that small retail business owners use to improve their profitability opportunities through global expansion. In section 2, I described my role as the researcher, the selection of participants, the research method and design, the population and sampling strategy, the ethical research principles, the data collection and analysis techniques, and the study's reliability and validity aspects. In this section, I explained how I ensured the research's dependability, credibility, and transferability. I used member checking, audit trail, and triangulation to ensure the reliability and validity of my study.

In section 3, I detail my research findings and explain how the information in the research applies to small business global expansion strategies to enhance profitability. I also will cover how this study may encourage social change in this final section and reflect on my experience as a researcher. Moreover, I recommend further actions to improve small retail business profitability through global expansion.

Section 3: Application to Professional Practice and Implications for Change

Introduction

In this multiple qualitative case study, I explored strategies that small retail business owners use to improve their profitability opportunities through global expansion. I conducted semistructured interviews with five small retail business owners who successfully expanded their business internationally. The participants answered the eight open-ended interview questions to answer the research question: What strategies do small retail business owners use to improve their profitability opportunities through global expansion? I conducted the interviews in a secure environment and tagged the various participants with the codes P1 to P5. I performed member checking and methodological triangulation to ensure data saturation, reliability, and validity of the study results. Four major themes emerged: (a) value creation, (b) social networks, (c) value creation, and (d) digital platforms. The study findings, conceptual framework, and related literature are aligned. Figure 2 below illustrates the word's frequency in the data.

Figure 2

Word's Cloud – Extracted from NVivo 12

Presentation of the Findings

The overarching research question was: What strategies do small retail business owners use to improve their profitability opportunities through global expansion? I conducted semistructured interviews with five participants to understand what strategies small retail business owners use to expand their business internationally. Before scheduling the interview, all participants received the informed consent form electronically. Interviews were conducted virtually with little to no distractions. After completing each interview, I transcribed the audio recording, wrote up my interpretations of the participants' responses, and sent the summary to each participant for member check review to confirm the accuracy and correctness of the data. Each participant was given a code for confidentiality (P1, P2, P3, P4, and P5). I used NVivo 12 to simplify the data analysis process. Within NVivo 12, I compiled interview recordings, transcripts, member check summaries, and organizational documents.

The data were saturated since no new information or themes appeared, and the data became repetitive. I manually coded the data and then used the NVivo software to help identify apparent themes through word and phrase frequency. Through the data analysis, four themes emerged: (a) strategic positioning, (b) social networks, (c) value creation, and (d) digital platforms. Table 2 illustrates the description and frequency of occurrence for each theme.

Table 2

Theme's Summary

Themes	Sources	References
Strategic Positioning	5	19
Digital Platforms	5	14
Social Network	5	17
Value Creation	5	15

Codes and themes came from the transcribed interviews and collected data related to the research question, conceptual framework, and existing knowledge from literature reviews. The findings indicate small business owners' strategies to expand their business internationally. The five small business owners met the criteria of being in the retail industry, located in the Northeast of the United States, and successfully expanded internationally. I entered the data into NVivo and found the following four themes.

Theme 1: Strategic Positioning

All participants indicated that the selection of the international target market was based on specific criteria and played a crucial role in their success in those areas. Customers' demands and preferences were the drivers for P1, P3, and P5 location selection. P1 said,

> It took about 6 months to a year to do research. Initially, the research was based on sales, so we looked at the number of sales coming internationally and where the bulk of those sales was. So that is why we picked those two best-selling areas. Then we looked at what places were kid-friendly or family-friendly, whether bookstores or Amazon.

P1 added, "We surveyed to see how many individuals would be interested in it and to look at the global populations that best suit our market, which turned out to be Canada, the UK, and the London area." P4 echoed P1's perspective, "We monitored where sales were coming from when we were in the United States before expanding and followed the trend." P3 explained, "We picked London for the United Kingdom (UK) location because we knew it is a central location and everything is a few hours away." P4 had other consideration factors. P5 mirrored the same by saying, "We targeted the countries where most of the questions came from as that is the base for the high demand to confront our business internationally."

P2, P3, and P4 revealed that the economic aspect was in their considerations in the international location selection. P2 mentioned,

> The US dollar conversion rate variance to other currencies makes it hard for interested clients to purchase. So, we focused on the international markets with high market value for our products and the markets that have a close value of their currency to the US dollar.

P3 also said, "our products are valuables and shipping rates are high, so we targeted countries with a strong economy where our products are affordable." P4 shared, "we have the currency value to the US dollar in consideration of the entry mode selection."

The strategic positioning theme aligned with this study's conceptual framework. Small business owners develop relationships to gain benefits and solve the limitation of their resources through their social networks. Porter's five forces theory reveals that the international expansion strategy must prioritize new entries due to threats from market saturation and the advancement of local merchants' competitive advantages. Buyers in the target market have high market power if they can easily switch from one supplier to another. Buyer's power impacts pricing and quality service delivery (Wellner & Lakotta, 2020). Omsa et al. (2017) mentioned that goods could only be substitutes when differentiated in place of the present ones. Thus, substitute products reduce the supplier power and the market's attractiveness.

The strategic positioning theme finding confirms the body of knowledge from the literature and other peer-reviewed studies. Market research is a crucial factor in the global business expansion strategy matrix. Business owners' awareness of the advantages and intricacies of international markets aids in advancing their expansion opportunities. Opresnik et al. (2017) posited that businesses often fail to get the product's location right for foreign markets. Businesses consider market research a primary factor when exploring new territories away from domestic variants (Dang et al., 2020). Seo and Lee (2019) noted that firms' offerings must match people's needs to thrive. Understanding the individual characteristics of a society is critical to creating a suitable plan for business success. According to the product life cycle theory, the location could limit the product's expansion at the introductory stage. The focus should be on growing the domestic market concurrently with differentiating their offerings (Kessler & Pozen, 2016). International expansion becomes essential in the growth stage since it reaches market saturation and attracts more competitors. Conditions such as location and access to raw materials affect the ability of a firm to venture into a global business. Wilbard et al. (2018) indicated that retailers consider location and convenience shopping to be competitive in the market. Organizations should understand the foreign markets they are planning to invest in, assess the associated risks, and build effective plans for that international expansion.

Theme 2: Value Creation

My data analysis revealed 15 references related to the value creation theme, which includes competitive advantages such as unique offerings, low costs, customer satisfaction, diverse products and services, and niche clients that differentiates them from competitors. For example, P3 and P4 highlighted that customer satisfaction is one of the essential factors for their success locally and internationally. P3 stated, "Focusing on customer satisfaction and servicing made our customers happy, which enabled us to sustain our international business and have them return to our stores again and be loyal to our brand." P4 confirmed that by saying, "We focus on customer service and just spread the word." P2, P3, and P4 focused on lowering their prices by reducing the expenses to make them more appealing to buyers. For example, P2 said, "We offered free shipping since it is so cheap on our end." P3 confirmed the same, "Shipping fees are very high for some regions, making it hard for interested clients to buy our products, so we sent our products in bulk to these countries to reduce shipping fees." P4 mentioned, "we make sure that everyone in the target audience can purchase our products and that we are limiting ourselves." P4 added, "would recommend launching more sampling and testing before getting any inventory in the foreign market to test which products will be in high demand and avoid additional expenses."

P1, P3, and P4 covered the importance of having unique offerings in creating value for your business and products. P1 indicated, "Some markets are scaled or niche for our particular audience, multicultural audiences, minority audiences with international marketplaces for individuals like their own Google or items for black, international indigenous people in different areas." P1 added, “There are a couple of things that I think are important as an entrepreneur, and one is knowing your why. Knowing why doing the business and keeping it genuine and authentic will make a huge difference." P3 indicated that one of their success reasons is that "our products are niche, not for everybody." P4 echoed P3, meaning, "Our products are not for everyone; they are for particular target audiences.

Additionally, diverse offerings increase business expansion opportunities. P1 clarified, "We sold new products to accommodate global changes and included clothing and home goods such as bedding, towels, and hooded towels. The backpacks remained one of our most popular products." P2 advised, "Because our main target audience is middle-upper class, we make sure that everyone in the target audience can purchase our products and that we are limiting ourselves."

This theme is connected to the literature. Small business owners focus on identifying market gaps in the target entry countries. Huang and Rust (2017) outlined that poor product strategy is one of the primary contributors to business failure in the global market. According to the product lifecycle theory, most business owners tend to variate their product designs at the maturity stage, depending on their target country, as a way of developing a competitive advantage since most of their sales tend to be at the optimum and constant at this stage (Nadeau & Casselman, 2016). The monopolistic advantage theory emphasizes that the success of international business arises from its uniqueness. According to Buckley (2019), competitive advantage plays a significant role in the global expansion of a firm. For example, Gao et al. (2017) stated that failing to cope with information technology within the global climate could affect its competitiveness. Bhavana (2016) mentioned that some retail firms' competitive strategies comprise quality and service-driven strategies to acquire customers and retain the existing ones. Business owners need to consider product modifications or process improvements for value creation and the competitive advantage of their business.

My analysis tie this theme confirms the conceptual framework for my study. Porter's five forces theory emphasizes that the international expansion strategy must focus on competition due to threats from market distribution and the advancement of local merchants' competitive advantages. For example, retailers could ship supplies to a reseller or a single large buyer rather than incur logistical charges involved in serving numerous small buyers. Consumer bargaining power also can reduce a firm's profitability when customers demand high-quality products at lower prices. Business owners must identify and satisfy consumer needs (Gamble et al., 2019). Product differentiation in a foreign market is the only way to prevent substitutes for its products (Ibrahim & Primiana, 2015). Business owners can succeed by maintaining an authoritative position in the market and being flexible enough to change consumer tastes and preferences.

Theme 3: Social Network

Small businesses rely on networking with customers, influencers, suppliers, partners, and communities through social media, roadshows, traveling, and emails to expand and sustain their business. All of the participants have used social media platforms for worldwide expansion. P1 said, “We directly interacted with individuals and our customers through social media to hear from them and sent out some surveys.” P1 also has in-person interactions. P1 mentioned, “We are serious about connecting with individuals, building communities, and uplifting people to make them feel confident, trust and know us, and like what we are doing because we are patient about helping people."

He believed, "Talking to and being in front of people is the best way to keep up with the client's needs.” P2 emphasized, “Talking to and being in front of people is the best way to keep up with the client's needs.” P2 believes that “Good and bad news travels very fast on social media, so allowing people to see real live people in these dresses has given more personal touch to the actual business.” P3 confirmed, “Social media platforms such as Instagram, Facebook, and Pinterest are crucial to sustaining our international business as they bring many customers to us.” P4 summarized the networking activities, “Conducting weekly and monthly trade shows and getting people’s feedback worked very well to sustain our business in the UK. We interacted with clients through conventions and trade shows and requested feedback to learn about opportunities and needs." P5 echoed all participants' perspectives:

> In terms of expansion, we worked on Instagram, social media ads, and influencers in those regions to collaborate with us. So if we were trying to expand to the UK or Canada, we would partner with influencers in that region, send them our products, and ask them to post them.

Small business owners should expand their social networks to scale their access to funding, human resources, and marketing intelligence data. Entrepreneurs who recognize the product life cycle theory can design the international trade path during the product's maturity cycle. Before expanding globally, business owners should conduct extensive research on industry analysis and speak with consumers, suppliers, and other industry stakeholders (Nadeau & Casselman, 2016). Companies, through social networking, must analyze the target market's beliefs and values when establishing in a foreign area to avoid negative actions impacting their culture and sustain a positive impression.

The culture and social values of a group have a significant influence on a business. In addressing some of how firms internationalize, growing corporations will need access to worldwide markets to remain profitable. Porter's model aligns with the product lifecycle theory's recommendation of focusing on succeeding domestically in the introduction stage and considering global expansion in the following stage. Networking with customers through influencers, social media, roadshows, and traveling with outstanding reviews helps expand and sustain the business internationally.

Theme 4: Digital Platforms

Digital platforms and e-commerce models played a significant role in expanding my participant's business globally, especially during the Covid-19 pandemic arena. P1 indicated,

> We sell through our website and our Amazon store; the bulk of our larger orders goes into that because they can manage and fulfill those orders faster. We also want to expand on the retail side as we just expanded into Amazon, Canada, and Mexico.

He added, "the scale has been consistent with the international through social media, the internet, online marketing, and follow-up with people and various marketplaces." P2 explained, "We reached international clients through Facebook ads because many international clients reach out to their family members living in the United States for recommended products." P3 prioritized technology advancement enhancements; he said, "We are focused on expanding online platforms to sell our products and get more customers." P4 optimized their communications through technology, "We are doing a lot of marketing and client communication consistently to sustain our international presence. So, we send many emails and use social media such as Facebook and Instagram." P5 took advantage of its digital platforms in several ways, such as selecting the target market and simplifying the shipment process. P5 said, "The Instagram business profile shows us which countries for most of our followers. It displays where businesses are getting the most followers and where they are reaching the most." P5 added,

> We used Shopify's platform for our website, which makes it easier to take and complete international orders by clicking a few buttons. Everything is prefilled out, including custom forms for shipping packages already. When it comes to Instagram and other social media ads, you can click off the target region or market.

The retail industry has experienced tremendous growth in e-commerce as consumers have shifted their spending online. Gao et al. (2017) suggested that firms that expand globally must sense technological transformations and implement the necessary solutions. Firms could use several technological developments to improve their products and techniques besides enhancing manufacturing processes. Tabetando (2018) stated that technology could risk firms when it becomes obsolete; therefore, they must embrace the most recent technologies. Bhavana (2016) reported that retailers are using the Internet of Things technologies to gain a competitive advantage by improving the ecosystem that connects the digital and physical world, allowing real-time interactions with consumers inside and outside the store. Supporters of the Monopolistic Advantage theory argue that firms can create wealth through technological advancements and invest in other businesses in other parts of the world (Kurz, 2017). Digital platforms enable businesses to venture into a global business. Intelligent communication will lead to enhanced efficiency in operations.

Entrepreneurs have a vision for an opportunity to identify overlooked niches and put them at the forefront of innovation. Digital platforms, such as websites, social media sites, Google translate, digital wallets, and Shopify, improved business growth and complemented marketing, finance, and international expansion. A significant portion of Porter's five forces model focuses on the bargaining power of buyers. Buyers' bargaining power has increased significantly due to accessibility to more information via the internet and technology (Bruijl, 2018), so the threat of new entrants has decreased since companies are investing in technology.

Applications to Professional Practice

The findings of this study are valuable for the business. Globalization has helped in the growth of worldwide trade and finance. The purpose of this study was to help small business owners to expand their businesses internationally. I conducted interviews with five small retail business owners who met the research criteria and identified four themes using NVivo coding, which are: (a) Strategic positioning, (b) social networks, (c) value creation, and (d) digital platforms. Small business owners need to build strategies based on the critical components of these four themes for their international expansion.

Globalization incorporates many disciplines and schools of thought and shares interconnected in different fields such as economics, marketing, technology, and political science (Hendee, 2016), which align with the emerging themes from my analysis.

Globalization has made nations collaborate closely, leading to a faster access to technology, improved communication, and innovation (Rostow, 1991). The opening of the global market is increasing the pressure on businesses to meet the customers' diverse needs and therefore requires developing and implementing strategies to address the derivative business opportunities for benefiting businesses and communities. The effect of globalization on small businesses has received a lot of attention in the past few years due to its significant contributions to the economy of both developing and developed countries. Although globalization can help small businesses grow faster and open the world markets, it imposes many challenges to small business operations and their survival simultaneously. Small retail business owners need to use the study's findings to develop and deploy strategies to facilitate their products' integration into the international market.

Implications for Social Change

The implications for positive social change include facilitating the integration of the small retail business into the international market and developing the small business sector. The global expansion of small businesses enables societies to purchase cheaper goods, increase trade, and enhance international economic participation. The success of small businesses can also lead to economic growth and poverty alleviation, enabling more remarkable community development by increasing tax revenues.

The impact of globalization on positive social change includes increasing connectivity and relationships among people from different nations to facilitate the flow of goods, capital, services, and labor. The globalization of small businesses has positive effects on economic growth, employment, income distribution, and other social benefits such as opportunities for poverty reduction, increasing labor rights, and environmental contributions to improve living standards.

Recommendations for Action

Small business owners must apply strategies to increase their profitability opportunities to expand internationally. Recommendations of action may be helpful for small business owners to transform into worldwide businesses. The recommendations are: (a) Perform regional market research analysis on the target expansion location to have data-driven decisions, (b) Use digital platforms to scale and expand their business, (c) Add value to offerings to differentiate your business among competitors, and (d) Keep in touch with clients, suppliers, marketplaces, and influencers to get truthful feedback and satisfy customer’s needs.

To prevent failures, small business owners need education, training, or attending seminars related to specific fields. They might also need to obtain professional advisors. Government support is crucial for the global expansion of small businesses since it helps small businesses global expansion since it helps mitigate entrepreneurs’ challenges and provides policies to assist them. An ideal business environment, lack of bureaucracy, and an available workforce are some government support elements for small business owners. I will circulate the findings of this study to the participants, government sectors such as the U.S. Small Business Association, scholarly journals, and entrepreneurship conferences.

Recommendations for Further Research

List recommendations for further study related to improved practice in business. Identify how limitations identified in Section 1, Limitations, can be addressed in future research. I used a qualitative case study because it suits this study's purpose and resources constraint. The limitations are the sample size, the research method and design, and the demographic of the participants. The five small retail business owners in the Northeast region of the United States might not represent the whole small business industry to explore the strategies needed for small business owners to expand globally. A larger number of participants across all regions of the United States might be better for future researchers to improve reliability and validity.

Reflections

My experience during the doctoral study journey was rewarding. It was a combination of excellent educational knowledge and exposure to challenges. I gained remarkable knowledge from literature reviews, especially about small businesses and academic research requirements, ethics, and the researcher's obligations for the researcher. For example, I used reliable and justifiable data to mitigate my biases toward personal views or beliefs. The journey has been a path of self-discovery and potential. DDBA doctoral program challenged me to fulfill my parents' lifelong dream and improve my research and writing skills. It prepared me to perform additional research and explore other business challenges.

Conclusion

The role of small businesses in the United States is vital for communities and governments. Small business impacts affect a country's economic, social, and political development (Rolleri et al., 2016). Helping small businesses succeed is the government's primary goal to reduce unemployment, increase the government's income taxes, and promote positive social changes (Small Business Administration (SBA), 2018). Firms that do not engage in international business yield worse performance measures than those conducting cross-border operations. Small business owners need growth strategies to expand their businesses internationally (SBA, 2019). Small business owners must have the passion and strategy to compete efficiently and remain active in the market (Achtenhagen et al., 2017). However, Small business owners struggle to grow globally (SBA, 2019), so there is a need to solve this applied business problem for small business owners to survive. In this case study, I explored internationalization strategies that small business owners use to expand internationally. Four major themes emerged: (a) strategic positioning, (b) social networks, (c) value creation, and (d) digital platforms. The study results included participants' insights that provide community transformation strategies and bring sustainable social change.

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Appendix A: Interview Protocol

1. Contact participants by email or phone to ensure they will participate in the study.
2. Contact participants by email or phone to set the time and place of interviews.
3. Kickoff interview protocol and introduce myself to participants.
4. Allow the applicant to introduce themselves
5. Present consent form, go over contents, and answer participants' questions
6. Participants to sign a consent form before the interview and get a copy of the consent form.
7. Turn on the recording device, note the date, time, and location.
8. Follow the procedure to introduce participants with a coded identification; note the date and time.
9. Begin the interview questions.
10. Follow up with additional questions.
11. End interview; discuss member-checking with participants.
12. Schedule follow-up member-checking interview
13. End interview protocol.

Appendix B: Interview Questions

1. What strategies have you used to expand your business internationally?
2. What strategies worked well to expand your business internationally?
3. How did you select your international target market?
4. What was your organization's international market entry mode?
5. What strategies have you used to sustain your international business expansion?
6. What strategies worked well to sustain your international business expansion?
7. How did you address the challenges of expanding your business internationally?
8. What additional information would you like to share about the global expansion of your business?

Appendix C: CITI Program Certification

CITI PROGRAM

Completion Date 13-Feb-2022
Expiration Date N/A
Record ID 47408426

This is to certify that:

May Alkkhudari

Has completed the following CITI Program course:

Not valid for renewal of certification through CME.

Student's
(Curriculum Group)
Doctoral Student Researchers
(Course Learner Group)
1 - Basic Course
(Stage)

Under requirements set by:

Walden University

CITI
Collaborative Institutional Training Initiative

Verify at www.citiprogram.org/verify/?w49b9ebdc-9a05-467b-be7e-3f196b0702e2-47408426