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Strategies Used by Small Traditional Retail Business Owners for Sustainability

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This is to certify that the doctoral study by

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Walden University
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Abstract

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MBA, University of Maryland University College, 2017

MS, University of Maryland University College, 2015

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Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

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Abstract

Small businesses fail at an alarming rate, negatively affecting job creation because small

business owners create a major portion of jobs in the United States. In March of 2020,

274,000 businesses failed in the United States, resulting in 76,000 lost jobs. Owners of

small traditional retail stores are significantly challenged to avoid financial failure.

Grounded in Schumpeter's entrepreneurship theory, the purpose of this qualitative

multiple-case study was to explore strategies owners of small traditional retail stores used

to survive beyond the first 5 years of operations. Participants included five owners of

small traditional retail stores in Missouri whose businesses survived beyond the first 5

years of operations. Data were collected from semistructured interviews and company

documents. Thematic analysis of the data resulted in two themes: community

involvement improved business visibility and the availability of financial resources

generated logistical inventory and an increase in advertisement resources. A key

recommendation includes improving business visibility by involving the business in

community events and festivals, hosting events at the business, and conducting customer

satisfaction surveys. The implications for positive social change include the potential for

small business leaders to reduce failure rates of small traditional retail stores, which

might lead to more tax revenues and jobs for communities.

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Dedication

I dedicate this study to my children, Zachery Ezem Faas and Zeal Obim Faas, as well as to my parents, siblings, cousins, and close friends. They all showed their support, love, patience, and understanding during this journey I had to embark on to make my dream a reality. A very special thank you to my fellow candidates that motivated me throughout the entire process, Dr. Geneva, Dr. Jeff and Dr. Maurice. Thank you.

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I am thankful to my chair, Dr. Jorge Gaytan, whose attention to detail, passion to mentor students, unwavering patience, and keen directions guided me as I patiently but diligently struggled through this study. He guided me to refine and improve my writing to a scholarly level. I would also like to thank my committee members, my fellow peers, as well as my peer reviewer. To all who played a part, slight or significant in this process.

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Section 1: Foundation of the Study

Small business ownership is the beginning phase for entrepreneurship, as entrepreneurs work towards creating new innovative opportunities with a goal of increasing their business ventures (Stamm et al., 2019). In the U.S. economy, entrepreneurial businesses contribute to the growth and success of small businesses (U.S. Bureau of Labor Statistics [BLS], 2016). Even though only about half of all small businesses survive beyond 5 years after startup (Motoyama, 2019), small businesses account for 46% of new Missouri jobs in 2017 (U.S. Small Business Administration , 2020a). During the fourth quarter of 2020, 5,588 small businesses started up in Missouri; however, 5,046 are no longer in existence (U.S. Small Business Administration, 2020b). Missouri startup businesses generated 14,565 new jobs, with a recorded 13,358 job losses due to failed businesses in the fourth quarter of 2018 (U.S. Small Business Administration, 2020a). I used a qualitative case study design to explore strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations.

Background of the Problem

While some small businesses thrive, half fail during their startup stages and within the first 5 years of operation (Motoyama, 2019). Ogbari et al. (2018) suggested stimuli for successful small businesses include but are not limited to innovative strategies, adequate training, effective customer service, time management and financial management skills, efficient marketing strategies, and knowledge and motivation of new

business owners and staff. Fairlie (2013) stated that during the great recession, job-seeking residents had to go into business to survive; however, the hardship of that period made it even more difficult to be successful and sustainable due to not receiving adequate capital, not being approved for business loans, or fear of failure due to reduced labor and products.

Small business owners had a choice to either equip themselves with tools that were necessary to be successful or fail (Soublière & Gehman, 2020). In 2018, new small business owners were still struggling to survive beyond the first few years of operations when they failed to avoid vicious cycles from past failures and mistakes (Herger, 2021). Business owners who are able to educate themselves and have experience with business finance, design thinking, team management, and marketing strategies are more likely to survive the first 5 years of operations (Ravi, 2021).

Problem Statement

Small businesses have failed at an alarming rate, negatively affecting job creation because small business owners create a major portion of jobs in the United States (Xu & Li, 2022). In March of 2020, 316,000 businesses were created in the United States and 274,000 businesses exited the economy (U.S. Bureau of Labor Statistics, 2021). The general business problem is that small businesses have failed at high rates, resulting in job loss. The specific business problem is that some owners of small traditional retail stores lack strategies to survive beyond the first 5 years of operations.

Purpose Statement

The purpose of this qualitative multiple case study was to explore strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations. The sample population consisted of five owners of small traditional retail stores located in the State of Missouri with successful experience using strategies to survive beyond the first 5 years of operations. The implications for positive social change include the potential to reduce failure rates of small traditional retail stores, which might lead to more tax revenues for local communities, resulting in the provision of social amenities and the creation of more jobs for residents.

Nature of the Study

Researchers identify the research method based on the nature of a study. Qualitative, quantitative, and mixed methods are the three research methodologies for conducting formal research (Yin, 2018). I selected the qualitative methodology for this study because I explored a business problem involving the survival and sustainability of small traditional retail stores, within the context of the problem's natural setting. For an adaptable, context-sensitive, and data-driven exploration of a problem or phenomenon, researchers use qualitative methodology. This methodology is credited for its advocacy to real world complex experiences (Larkin et al., 2019). When the objective is to analyze numerical data or test hypotheses about variables' relationships or differences, researchers use the quantitative methodology (Reddy, 2020). I did not select the quantitative research methodology because I did not analyze numerical data or test

hypotheses. Researchers use mixed methods when integrating qualitative and quantitative methodologies into a single study to collect and analyze data and report study findings (Reddy, 2020). I did not select the mixed methodology because the focus of my study was not to analyze numerical data or test hypotheses involving variable relationships or differences.

Qualitative research designs that I considered for this study were case study, narrative, ethnographic, and phenomenological. Researchers use the case study design to explore the *what, why,* and *how* of a phenomenon in its natural setting (Yin, 2018). Researchers select the multiple case study design because it may lead to a more in-depth and insightful case study than the single case study (Yin, 2018). I selected the multiple case study design to explore the *what, why,* and *how* of a business phenomenon, which is the financial survival and sustainability of small traditional retail stores. Researchers use the narrative design to explore individual or small group life stories (Kruth, 2015). I did not select the narrative design because the focus of this study was not to explore individual or small group life stories. In ethnographic research design, the researcher studies shared behavioral patterns, beliefs, and languages of cultural groups (Yin, 2018). The focus of this study was not to explore cultural groups' shared behavioral patterns, beliefs, or languages, and therefore the ethnographic design was not suitable for this case study. Researchers use the phenomenological design to explore meanings ofindividuals' lived experiences about researched phenomena (Larkin et al., 2019). I did not select the

phenomenological design because I did not explore the meanings of individuals' lived experiences about a phenomenon.

Research Question

What strategies do owners of small traditional retail stores use to survive beyond the first 5 years of operations?

Interview Questions

1. What strategies did you use in your organization to successfully survive beyond the first 5 years of operations?

2. How were strategies to survive beyond the first 5 years of operations communicated throughout the organizational ranks and among stakeholders?

3. How did your employees respond to those strategies?

4. What modifications did you apply to any strategy to improve its effectiveness in helping your organization survive beyond the first 5 years of operations?

5. What derivative policies and processes have you used to successfully survive beyond the first 5 years of operations in your organization?

6. What were the key barriers to implementing successful strategies to help your organization survive beyond the first 5 years of operations?

7. How did you overcome the key barriers to implementing strategies to help your organization survive beyond the first 5 years of operations?

8.   What else would you like to add about successful strategies used in your

organization to survive beyond the first 5 years of operations?

Conceptual Framework

The conceptual framework for this study was the entrepreneurship theory. Joseph

Schumpeter introduced the entrepreneur theory in 1934. Schumpeter (1934) defined an

entrepreneur as an innovator pursuing new opportunities and overcoming barriers while

performing new tasks. According to Voegel and Voegel (2020), entrepreneurs enter an

uncertain environment to create and develop resources that will increase profitability and

gain sustainability for their growing business. Business owners use the main principles of

the entrepreneurship theory by establishing new business opportunities, encompassing a

distinct self-discipline, exploring and investing only in lucrative and innovative ideas,

executing ideas in a profitable method, and consistently exuberating positivity towards

new business ideas, which are creative new ideas that entrepreneurs must possess

(Samoedra et al., 2021; Zhang & Van Burg, 2020). The principles of the entrepreneurship

theory aligned with the purpose of this study.

The entrepreneurship theory served as an appropriate conceptual framework for

this study, as owners of small traditional retail stores used principles and attributes of the

entrepreneurship theory to survive beyond the first 5 years of operation. According to

Schumpeter (1934), the role of the entrepreneur as an innovator involves five

characteristics: (a) introduction of new goods or quality of goods, (b) introduction of a

new production method, (c) establishment of a new market, (d) use of new sources of raw

material suppliers, and (e) formation of a new organization in the industry. I selected the entrepreneurship theory to serve as a foundation to understand strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations.

Operational Definitions

Crowdfunding: Crowdfunding is the funding of a project or business by a group of individuals making small or significant contributions towards the goal (Taeuscher et al., 2021).

Social change: Social change is the positive process of transforming a business to address beneficial social outcomes and awareness (Omri et al., 2015).

Small business: A small business is a small-sized entity consisting of fewer than 500 employees (U.S. Small Business Administration, 2020a).

Sustainability: Sustainability refers to an ongoing business service or product that provides a need that customers seek (Voegel & Voegel, 2020).

Venture capital: Venture capital is startup funds used by investors during the early stages of growing a startup company (Röhm et al., 2017).

Assumptions, Limitations, and Delimitations

Assumptions, limitations, and delimitations are lenses into the field of study, the general perspective into the topic, the restrictions that hindered or limited the research, and the areas about the study that had to be minimized, omitted, or adjusted to fit the study (Theofanidis & Fountouki, 2019).

Assumptions

Assumptions are somewhat outside the researcher's control, it is the researcher's beliefs that are still to be verified. It is meant to lead to a solid ground background for the researcher (Theofanidis & Fountouki, 2019). I assumed that businesses would be willing to participate in this case study. My assumption was that the gathered company information on these selected businesses, along with the answers that would be provided by these participants, would provide an adequate and comprehensive overview and clarification that would answer the research question for this study.

Some of the documents I reviewed included annual cash flows, balance statements, monthly cash flows, business plans, and daily profit reports. I expected participants to be honest, truthful, cooperative and not biased. Another assumption was that this study would assist small businesses in providing professional services as well as community involvement, leading to positive social change that would in turn sustain their businesses, and provide stability for their family, employees, and the economy.

Limitations

Limitations are unaccounted weaknesses observed by researchers which could hinder the process of data collection (Theofanidis & Fountouki, 2019). A limitation of this study was that only a few individuals participated in this study. Conducting a study with a limited number of organizations prevented the application of findings across the retail store industry. Additionally, some individuals decided not to participate in the

study, thereby delaying the research timeline. Furthermore, the time limit for interviews was another limitation of the study.

Delimitations

Delimitations are boundaries that surround the overall study (Theofanidis & Fountouki, 2019). A delimitation of this study was using only small businesses in the retail industry, located in the State of Missouri, participated in this study. However, the scope and boundary of this study required a specificity that categorized industries to ensure similarities and specificity.

Significance of the Study

Owners of small traditional retail stores may use the findings from this study to increase their businesses' success rates beyond the first 5 years of operations. In this subsection, I address the potential contributions to business practice of this study. Lastly, I discuss this study's implications for positive social change.

Contribution to Business Practice

In the United States, 530,052 small businesses with 100 or fewer employees closed their doors in 2015 (U.S. Census Bureau, 2017). The financial success of small business owners is derived from the strategic decisions and flexible resources provided by the small business owner (McDowell et al., 2016) because small business owners comprise 99% of all firms in the United States (U.S. Small Business Administration, 2020a). Small traditional retail store owners may use or adapt the successful strategies that emerged from this study to survive beyond the first 5 years of operations. The goal

and aspiration of small business owners is to become and remain successful and financially stable (Santos & Cincera, 2022).

Implications for Social Change

Omri et al. (2015) stated that positive social change is a process of transformation that leads to beneficial outcomes and awareness. Job availability, higher income, improved living conditions, and greater opportunities could occur in the local community because of small business owners' success (Shrivastava et al., 2020). Successful small business owners improve the social and economic conditions of local communities by donating funds that increase quality of life and productivity in the communities (Braunstein et al., 2021). The implications for positive social change include the potential to reduce the failure rate of small traditional retail stores, which could lead to more tax revenues for the communities, resulting in the development of social amenities and the creation of more jobs for the residents.

<div align="center">A Review of the Professional and Academic Literature</div>

I reviewed the literature on survival strategies owners of small traditional retail stores published in various journals and seminal scholarly books. Google Scholar, linked to the Walden University Library's website, served as the primary source for accessing journal articles. The Walden University Library allows students access to various databases. Databases used to obtain literature for this study included ABI/INFORM Complete, Academic Search Complete, Business Source Complete, Emerald Management, ProQuest Central, and SAGE Premier. Furthermore, I also accessed various

open journals to obtain literature related to survival strategies owners of small traditional stores use. AOSIS Open Journals provided peer-reviewed scholarly journals from various academic disciplines. Similarly, Science Direct provided a full-text scientific database containing journal articles and book chapters. In some instances, I accessed government websites to obtain information about survival strategies owners of small traditional stores used.

The strategy for searching through existing literature entailed the use of keywords and phrases in the various databases listed above. I applied filters to database searches to narrow down the search results. These filters included specific keywords, a specified period, and specific databases. When I used Google Scholar, I gave preference to articles published in or after 2019, ensuring the literature is topical and relevant. Secondly, I gave preference to articles that were available in the Walden University's Library. The keywords and phrases I used in my search were *small business, startups, innovation, survival,* and *sustainability*. I used Crossref to obtain digital object identifiers and Ulrich's Periodicals Directory to verify that the literature was peer-reviewed. The 223 references that this study contains include 201 scholarly peer-reviewed articles representing 90% of the total, seven government websites representing 3%, and 15 books representing 7%. The total number of references used in this study that were published within the 2019-2023 period is 157, which is 70% of the total number. The literature review contains 103 references, with 80 references published within the 2019-2023

period, representing 78%, and 103 from scholarly peer-reviewed sources,

representing 100%.

Literature Review Organization

The literature review section has several subsections. It begins with an

introduction, which includes information about the strategy for searching the literature,

the frequencies, and percentages of peer-reviewed articles as well as publication dates. In

the next section, I focus on the application of the literature to the research question and

included a brief description of the purpose of the study. The concepts that I discuss in this

literature review include entrepreneurship, leadership, strategic planning, and innovation.

Throughout the literature review, I compared and contrasted different researchers' points

of view.

The first section, entrepreneurship, relates to the economic and social growth of

business leaders and the strategies used to create and manage a business, transform the

company, and sustain the business. In this section, I elaborate on the entrepreneurship

theory and small business creativity, adaptation, and integration. I also present small

business leaders' development of innovative strategies to drive productivity. I also

include a discussion of entrepreneurship theory's contrasting and supporting theories.

The second section, leadership, starts with a brief overview of the

transformational leadership style used to engage employees, and keep them involved in

the unique procedures and expectations of small business leaders. I address the history of

small business' leadership knowledge management and the development of creative ideas

for business growth and survival overtime. I then review recent studies involving the experiences of owners of small traditional retail stores.

The third section is strategic planning, which starts with a general discussion of strategies used by entrepreneurs and small business owners to grow their businesses. I discuss several subthemes used to strategically grow their businesses. Financial management and capital acquisition obtained in the startup and sustaining stages is the first subtheme. The second subtheme is networking skills used to acquire strong marketing management and image branding. The third subtheme is a coaching and mentoring method that implement trainings and encourage learning, which enable new small business owners to expand their knowledge and grow.

The fourth section, innovation, focuses on strategies owners of small traditional retail stores used to create new ways to grow their businesses. I first discuss creative sales strategies used by small business owners to provide innovative products and services in small retail business. I then discuss the organizational change management needed to build the culture of the business. Lastly, I discuss the strategies that some small business owners used for survival and sustainability.

Application to the Applied Business Problem

The purpose of this qualitative multiple case study was to explore strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations. Developing an understanding of such strategies required a qualitative approach, more specifically an exploratory multiple case study. The findings from this

study provided insight into survival and sustainability from a group of business owner's perspectives. The findings of the study may assist with the development of appropriate survival strategies owners of small traditional stores used for business growth and sustainability.

Once an understanding of the underlying meanings emerged, appropriate strategies equipped leaders with the skills to improve their business structure, change process, and improve sustainability. Findings from the study may improve business practice by identifying appropriate strategies, leading to increased productivity and organizational competitiveness. The potential for social change includes development of strategies to improve small business profitability, survival, and personal wellbeing.

Entrepreneurship

Employees involved in a business entity that strives to keep everyone engaged, informed, and developed tend to dedicate more and expect less, while contributing to the growth of the business beyond those critical first 5 years of operation. In agreement with Schumpeter (1934), Jakhar and Krishna (2020) suggested that business owners strengthen their entity by ensuring the availability of abundant capital, providing adequate training, positioning in the right location, using effective marketing styles and having a capable management structure. In contrast to Schumpeter, Jakhar and Krishna stated that small businesses that provide experienced coaches or mentors to their entrepreneurial operation are bound to be more successful beyond the first 5 years of operation. Therefore, business

owners who offered these needed growth attributes to their employees, worked towards survival and sustainability beyond the critical first 5 years of operation.

Entrepreneurship Theory

Small business owners use entrepreneurship theory to explore the relationships found within their employees and the business. Schumpeter (1934) developed this theory in the 1930s, to provide business owners with a relevant process of operation that was efficient and effective. In agreement with Schumpeter, Stamm et al. (2019) stated that entrepreneurship is the process of creating new businesses, new products, new services or doing these three in new ways. Schumpeter combined innovation with commerce trade, and industrial undersupplied work design, which led to economic progress derived from entrepreneurial elements consisting of *strategic planning, management development, worthy attribution, consistent concept, and profitability*. These five traits build and mold Schumpeter's entrepreneurship theory.

Entrepreneurship theory emphasizes these five traits. Many scholars focused their attention on business strategy, innovation, leadership, management, and economic history, as reasons for small businesses to be successful and sustainable (Avanesian & Nino, 2020). According to McGee and Peterson (2019), the focus was on Schumpeter's (1934) three fundamentals of entrepreneurship which are innovativeness, proactiveness, and risk taking. In agreement with Schumpeter, Avanesian and Nino (2020) placed significant emphasis on entrepreneurship theory, causing the creation of new small businesses, and economic growth to increase. These entrepreneurs enrolled in college-

level education and became better skilled in specialized areas that helped boost their small business knowledge. McGee and Peterson suggested that these growing professional fields require skills sets and confidence that small business owners should possess to become successful.

Schumpeter (1934) introduced entrepreneurship theory with the suggestion that all aspects of a business are interrelated and contributory to one efficient system. It is the peak attribute that links together strong components from other business owners to attain a collected wholeness of operational progress (McMullen et al., 2021). Pan et al. (2019) agreed with Schumpeter that it involved finding a pattern that has already been proven worthy, pursuing it with intent, along with the determination to achieve a new business goal and growth. According to Morgeson et al. (2015), the suggested entrepreneurship theory aims to build a relationship amid businesses and their surrounding environment, creating a wholeness that separates individualism from the operation. With the accumulated use of varying research findings from studies conducted by Schumpeter and Wadhwani et al. (2020), entrepreneurship theory can be used advantageously to operate and implement successful strategies and sustainability in small business growth.

According to Pan et al. (2019), entrepreneurship theory is a personal identity that irradiates the strength and weakness of small business success strategy. It identifies the problems found in individualized operational process and conforms it to a wholeness that improves the operation of the small business (Haye et al., 2018). Through the determination and organizational skills of new small business owners, they eliminated

disorganization, avoided individualism, and employed a multi-operational strategy that would yield growth and profitability.

In agreement with Schumpeter (1934), Rauch (2020) suggested that business owners who utilize entrepreneurship theory transform their operation from a problematic operation to a thriving operation provided by past successful business owners. Moore et al. (2018) agreed with Schumpeter that it requires the structure of a continuous loop of growth and strategic planning, to aid and yield interconnected environmental behavior that promotes successful business growth. Business growth of entrepreneurs evolved from individualism to collaborative strategic plan.

Entrepreneurship theory emphasizes the relationship between inputs, processes, and outputs of activities that characterize discovered entrepreneurial pursuits (Woo et al., 2021). Schumpeter (1934) defined it as the steps small business owners must embark on to ensure accuracy in presenting the business they have worked to develop. Lucian and Sergiu (2019) agreed with Schumpeter by further elaborating that second-time business owners are more successful in their ability to input, process, and produce a plan, and create an ideological outcome that leads to success. Small business owners' success can be determined by understanding their ability to share their vision with others effectively, accept correction humbly, and have the capability of decision-making.

Entrepreneurs are assumed to be change agents; however, the Schumpeterian definition stated that entrepreneurs merely seek a change in their field (Diandra & Azmy, 2020). Jafari-Sadeghi et al., (2023) suggested that an entrepreneur is an individual who

transforms an established business from a challenging stage to an effective stage and expands a business from a small scene to a bigger one. Being that Schumpeter (1934) was considered an innovator and influential entrepreneurial researcher, he introduced economic change. Therefore, Ahlstrom et al. (2019) found challenges in determining a full economic performance, to guide entrepreneurship activities. The innovative ideas that boost economic growth lead to changes in the small businesses that are carried over into the community as a change agent, or merely seeking change (De Silva Lokuwaduge et al., 2020).

Economists have given various definitions of an entrepreneur; there is still no specific definition of an entrepreneur. Schumpeter's (1934) suggested attributes of an entrepreneur, which are creativity and innovativeness. Lucian and Sergiu (2019) indicated risk-taking as a strong attribute of an entrepreneur. Ahlstrom et al. (2019) supported Schumpeter by adding motivation, managerial skills, innovative skills, and financial capabilities to the list of attributes and characteristics required to be an entrepreneur.

Small business owners who are innovative and creative are bound to be moving on the path toward success and sustainability. Schumpeter (1934) described entrepreneurs as individuals who are creative and innovative with what they have. Williams et al., (2021) shared similarities with Schumpeter's two key attributes of creativity and innovativeness. Lucian and Sergiu (2019) stated that creativity requires the introduction of exciting new ways of doing things that leads to innovation, which is doing new things.

Laguna and Razmus (2019) acknowledged that creativity is a fundamental part of innovation. Williams et al. concurred that with the combination of creativity and innovation, any small business can reverse its poor economic performance.

To grow a small business' economic performance to sustainability, the entrepreneur must attain effective leadership skills. Leadership structure is the positioning of a leader among team members (Scott et al., 2020). Effective leaders have learned to increase motivation, drive, cognitive ability and their integrity as a tool to keep from making the same mistakes of their predecessors (Silvestri & Veltri, 2020). Exceptional leaders are those individuals that influence and guide businesses and organizations successfully. A typical stereotype is that leaders are beloved by all for their performance. Collaboration, interactions, and relationship between follower and leader rank high in the leadership hierarchy's basic skills (Young et al., 2020). Successful small business owners used a single leadership structure to manage their organization or business.

The drive of an entrepreneur is the desire for power and independence. Entrepreneurship comes from the joy in creating their destiny and winning mindset (Suriyankietkaew, 2022). Jafari-Sadeghi et al., (2023) presented the roadmap to new and creative products and services that give entrepreneurs competitive rewards in areas that challenged the political and social conditions in marketplaces. Schumpeter (1934) dove deep into the innovative strategies that entrepreneurs use to creatively present new products and services that redefine the conventional ways that business owners

previously conducted business or produced an item. Suriyankietkaew (2022), along with Schumpeter (1934), coincided with Schumpeter's entrepreneurship theory by redefining the importance of economic growth for an entrepreneur's business.

A person assuming a business risk without the fear of failing, preferably with the hope of making a profit, is an entrepreneur, according to Cantillon (1755). Cantillon's viewpoint is different to Schumpeter's (1934) definition of an entrepreneur as a business owner seeking new ways to perform the same business. Cantillon envisioned an entrepreneur as a risk-taker, a business owner choosing inconsistency in the flow of their daily business operations, while hoping that the inconsistency will yield abundance profit that will surpass the unknown journey of managing the business. Silvestri and Veltri (2020) addressed entrepreneurship theory in the same perspective as Schumpeter, that is, entrepreneurs should possess a deep passion for success and sustainability to withstand economic challenges, no matter the constraints.

Risk management is a process that business owners use to identify and forecast potential financial and business risks that they may encounter in their chosen field. Stanczyk et al. (2020) argued that new small business owners assume risks without knowing the outcome they would yield. This management skill could help entrepreneurs become more aware and ready to help prevent their business from failing. Cantillon (1755) and Schumpeter (1934) emphasized the need for business owners to avoid starting a new business without fully understanding all that encompasses the operation of a small business. Kurczewska et al. (2020) agreed that Schumpeter's entrepreneurship theory has

its foundation that exemplifies economic growth. Moretta Tartaglione et al. (2019) agreed with Kurczewska et al. in that Schumpeter's entrepreneurship theory has its foundation on economic growth because business leaders could plan strategically and predict possible risks.

Entrepreneurs embark on business ventures to generate wealth, maintain job security, create independence, develop value, and become change agents. Avdullahi and Ademi (2020) reasoned that business owners aim to become entrepreneurs with the uncertainty of future success in creating independence, developing value in their business, generating wealth through their service and products, or becoming change agents in their community. Gyimah and Adeola (2021), along with Stanczyk et al. (2020) agreed with Schumpeter's (1934) entrepreneurship theory, which states that business owners start a new business to generate income, maintain job security, and create independence, while striving to become change agents.

As social change agents, entrepreneurs engage in creating jobs for the sole satisfaction that it provides job opportunities for those in need, decreasing the unemployment rate in their community. Smith and Chimucheka (2014) viewed entrepreneurs as agents for economic growth. Tsvetkova and Partridge (2021), along with Rosca et al. (2020) and Rauch (2020), explored entrepreneurship theory, using the same examples Schumpeter (1934) used, to discover the reason that fuel the passion for such economic and social change growth. Business owners whose intention is to create jobs

for their neighborhood or to improve the social and economic standard of their

community are some of the entrepreneurs becoming advocates of social change.

A change agent is an individual with the following characteristics: innovative,

proficient in self-efficacy, independent, proactive, controlled, and detail oriented. These

are all qualities and attributes of an entrepreneur (Avdullahi & Ademi (2020); Ulrik &

Mette Lindahl, 2020). Schumpeter (1934) introduced these characteristics as some of the

traits used in recognizing entrepreneurs. Arnold (2019) analyzed the same characteristics

Schumpeter presented, which showed business owners as detail oriented, proactive, and

independent change agents that pride themselves in setting and achieving their goals.

Business owners possessing such traits along with having the education, experience,

capital and skills, demonstrate entrepreneurship characteristics described by Schumpeter

in the entrepreneurship theory (Arnold, 2020; Hawkins & Hoon, 2020; Ulrik & Mette

Lindahl, 2020).

Effective entrepreneurs are not afraid of taking action to achieve goals, as

entrepreneurs take charge and control of a business and all of its aspects to generate

profit. Schumpeter (1934) further explained that wealth earned and labor gained have a

positive effect on the success of entrepreneurs. Cantillon (1755) revisited this notion of

entrepreneurs as undertakers, as Debrulle et al. (2020) did, and agreed that the position of

the business owner as the calculated financial overseer for a new business creation is

adamant to the success of the operation. Rauch (2020) inquired about the overseers of a

company and the qualities they possess that integrates their abilities into

entrepreneurship. Rauch (2020), along with Shaw and Sorensen (2019), agreed that an entrepreneur has the qualities of innovation, such as self-efficacy, independent, proactive, controlled, detail oriented, and value-driven characteristics Schumpeter described.

Entrepreneurs managing the general operation of their businesses must have a sense of belonging, keen power of ownership, growth planning skills, economic insightfulness, and a calculated attached knowledge of the procedures needed to manage the business from startup to success (Acs et al., 2009). Bagheri and Harrison (2020) viewed entrepreneurship theory in the same light that Schumpeter (1934) used to summarize ownership and performance. Business owners taking ownership of the daily operations of the business ensures the day-to-day process yields productive activity (McGee & Peterson, 2019). McGee and Peterson (2019) and Thompson et al. (2020) agreed with Schumpeter that business owners that exude confidence are keen to undertake every aspect of the business by managing the daily operations of their establishment.

Entrepreneurship theory is a collaboration of enterprises and the activities that show relations to leadership, management, productivity, and profitability (Schumpeter, 1934). Omorede (2021) explored Schumpeter's entrepreneurship theory and the perception behind the success or failure of some entrepreneurs. Wut et al. (2021), Stamm et al. (2019), along with Feng and Chen (2020), declared that entrepreneurs are passionate about the mission and value of other entrepreneurs in an enterprise and will perform collaboratively towards this goal. These business owners combine their

resources, expertise, education, and passion for growing their businesses to provide their

success story to fellow entrepreneurs. Business owners lead and grow the economy and

other business owners in the community through mentorship and coaching.

Entrepreneurship theory encompasses the work of business owners collaborating with

others and conducting research to collect needed resources to build and sustain their

businesses. These entrepreneurs possess leadership skills that can lead to sustainability

(Feng & Chen, 2020; Stamm et al., 2019; Wut et al., 2021).

Other Contrasting and Supporting Theories

Small businesses comprise of entrepreneurs that dedicate their time and resources

to building an organization that is steadfast and profitable. Entrepreneurs are innovating

business owners creating opportunities for the survival and sustainability of their

business. I discuss three theories that support or contradict entrepreneurship theory used

in small business growth. The supporting theories in this session are the systems theory

and triple-loop learning theories. The contrasting theory is the theory of constraints

(TOC).

Systems Theory

Von Bertalanffy (1950) introduced systems theory in 1937 before generating the

general systems theory in 1950. According to Daniel et al., (2022), the general systems

theory can be used to inspire and improve communication while increasing knowledge in

object- and subject-oriented disciplines. Systems theory represents field management of

the business and all operational parts that, combined, make the organization functional

(Von Bertalanffy, 1972). Von Bertalanffy explained systems theory as a design that incorporates wholeness, rather than broken parts. Entrepreneurs aim to build their businesses by combining all separate components into a working and capable whole entity. Woo et al., (2021) stated that the cohesiveness of systems thinking results in the collaboration of all parts of the business.

Entrepreneurs create innovative characters developed to highlight external factors that influence systems and the manner in which the business owners respond to these external factors (Von Bertalanffy, 1972). Small business owners face various unforeseen obstacles in the operation of their businesses; however, with the use of systems theory, new small business owners would explore strategies to achieve growth and sustainability. According to Ahlstrom et al. (2019), individuals use systems theory to offer awareness into strategies entrepreneurs use to secure resources and funds required for the growth and sustainability of their businesses. Researchers and professionals used system theory to determine the similarities between small business growth and their environmental influence (O'Leary & Boland, 2020).

Triple-Loop Learning Theory

Leaders are learners continually learning to expand their knowledge and to be better prepared to teach others what they have learned. Triple-loop learning theory originated from single-loop learning and double-loop learning theories. It is a more refined version of the three approaches (Fahrenbach & Kragulj, 2020; Flood & Romm, 2018). Hawkins (1991) introduced triple-loop learning theory as the strategy and

procedures for (a) doing things the right way, (b) doing the right things, and (c) making the right decisions. Romme and van Witteloostuijn (1999) categorized triple-loop learning theory as one of the learning skills new small business owners use to acquire the knowledge needed to solve complex problems.

Entrepreneurs are problem solvers within small businesses. They are also the decision-makers among all of the many responsibilities that come with the position (Fahrenbach & Kragulj, 2020). With the provided tools from triple-loop learning theory, entrepreneurs are better equipped to do the right thing, at the right time, by making the right decision (Piñeiro-Chousa et al., 2020). Researchers have credited cognitive processing as the key for business owners to learn strategies for implementing triple-loop learning theory (Romme & van Witteloostuijn, 1999).

The successful performance of a small business lies in the capability of the leader's ability to learn, lead, and make sound decisions. This performance affects the profitability, survivability, and sustainability of small businesses. According to Piñeiro-Chousa et al. (2020), the potential in planning is from learning the process involved in the evaluation of the procedure, implementing into action an alternative plan to improve the business strategy. Entrepreneurs achieve high levels of success by planning, monitoring, controlling their daily operations, and learning from past experiences (Flood & Romm, 2018). Triple-loop learning theory is essential in the success and profitability of small business owners. Triple-loop learning theory guides small business owners in doing

things right, doing things the right way, and learning the best strategies to achieve their operational goals.

Theory of Constraints

Obstacles and limitations are platforms leading to success. When individuals face impediments, restrictions, and constraints, they feel empowered to push beyond their limits to achieve higher standards. According to Goldratt (1990), the TOC is a philosophy that focuses on the constraints that prevent and hinder small business owners from achieving their goals. The primary purpose of the TOC is to use a system of operation, learned from avoiding and overcoming obstacles to manage complex situations (Wilkinson et al., 2021). Entrepreneurs use the TOC to learn from past documented limitations that prevented them from achieving their set goals.

Unsuccessful entrepreneurs give up when obstacles and constraints challenge them from achieving their small businesses' goals (Wilkinson et al., 2021). Researchers identified seven relatable categories of restrictions that have hindered small business owners in the past, which are (a) finances, (b) resources, (c) market, (d) knowledge and competency, (e) policy, (f) supplier, and (g) material (Oglethorpe & Heron, 2013). According to Goldratt (1990), leaders of an organization should identify the cause of the constraints and problems they are facing and strategize accordingly to manage the issues effectively. This action would be more effective rather than misidentifying the wrong matters and fixing random issues (Wilkinson et al., 2021). These seven categories play significant roles in the successful operation of a small business.

Researchers use the TOC to describe system-based entrepreneurial philosophies that focus on consistent growth and successful improvement of small businesses and its owner's goals (Ikeziri et al., 2019). Wilkinson et al. (2021) added that the TOC could be used to identify small businesses operating unsuccessfully and with low profitability rates. Entrepreneurs could use the TOC to identify problems and obstacles affecting the daily operation of their small businesses (Goldratt, 1990). However, entrepreneurs should have the motivation and determination to explore all available avenues that will yield success rather than linger on those that will hinder progress. Leaders use the TOC to identify and avoid these hindrances in their organizations (Ikeziri et al., 2019). For this case study, the TOC is against previously discussed systems theory and triple-loop learning theory because entrepreneurs make strategic plans, learn new ways, and follow systems that yield profitability and sustainability. Entrepreneurs do not particularly allow obstacles to hinder the growth and success of their small business.

Leadership

Leadership, as well as theories discussed in this case study, does not take precedence to the conceptual framework selected for this study, which is entrepreneurship theory. However, there is a configuration that aligned with organizational performance, success, productivity, and small business owner's practicality. A literature gap exists between small business performance, sustainability, and success beyond the first 5 years; nevertheless, leadership provides growth needed for bridging this gap. The leader's role is to communicate a vision to the staff and set

reasonable expectations (AlOqlah, 2021). The leader's vision encourages commitment from the staff in small businesses. Liguori and Pittz (2020) stated that small business owners that adequately connect with their customers could subsequently result in small business survival.

Leadership is an essential attribute in any organization because strong leadership brings success within the industry. Effective leaders have natural traits to motivate employees to achieve organizational goals. Rosenbach (2018) stated that effective leaders introduce new directions for leadership concepts and practices concerning the value, character, and identity of the leader. Lee and Ding (2020) explained the psychological behaviors leaders face to perform exceptionally well. Lee and Ding further explained that various situations could lead to the need for change in organizations. Therefore, a leader needs to have the capability to make educated decisions, given the rising demands in the international market.

In the inconsistent and changing international market, organizational changes affect the way people come together for work, relationships are built and formed, and knowledge is transferred from coworkers to managers and leaders (AlOqlah, 2021). Rosenbach (2018) explored leaders challenged with the changing, inconsistent, and ambiguous world. Lee and Ding (2020) agreed with Rosenbach by identifying that transformational leaders are skilled with procedures and processes needed to improve the performance of employees of varying backgrounds in an uncertain international market, especially in a small business. Transformational leaders can improve employee

engagement and performance in a small business, thereby adding to the growth and survivability of the entity.

Leaders are expected to be relatable, authentic, ethical, and transformational. Small business leaders create an environment in which the staff is willing and dedicated to doing its best, and the patrons are expected to evaluate the effectiveness of the organization's customer care. Lai et al. (2020) stated that true leaders could improve insufficiencies when they have a strong passion towards their purpose if they have ethical values, can be unbiased and disciplined, and relatable to their staff and customers.

Researchers consider that the lack of leadership skills is a leading cause of small business failure. Oubrich et al. (2021) specified that leadership is a process that individuals utilize to encourage small business purposes and goals among their employees. Small business leaders proficient in leading performance are essential contributors to economic growth (Rosenbach, 2018). Small businesses require empowering leadership to survive and grow (Lee & Ding, 2020). Leaders use these learned skills to inspire and encourage their employees to work towards the shared vision for the business (AlOqlah, 2021). Liguori and Pittz (2020) explained that the role of a small business leader should include having a valuable creation, leveraging resources, along with passion and the perseverance for developing and sustaining business goals.

The term leadership has been a topic of discussion for various years among business experts (Oubrich et al., 2021; Rosenbach, 2018). Lee and Ding (2020) along with Schumpeter (1934), further explained that the core and definition of leadership skills

continue to evolve and grow. While researchers used entrepreneurship theory to explore the characteristics, determination, and motivation of individuals, researchers used leadership theory to explain that excellent leadership is not a deciding factor for entrepreneurial success. Strong leadership skills do not determine how successful small business would be; however, they enhance the knowledge base and skill set of small business owners, leading to survival and sustainability of their businesses beyond the first 5 years of operation.

The law of the lid describes that the lower an individual's ability to lead, the lower the lid on that individual's potential (Maxwell, 2007). Maxwell (2007) further explained that the first rule of leadership, which is the law of the lid, is an irrefutable law that is instrumental in guiding individuals to understanding the real value of leadership (Maxwell, 2007). The law of the lid would be ostensibly in every aspect of an individual's life. The higher the individual's ability to lead, the higher the lid on that individual's potential (Maxwell, 2007). This leadership rule plays a significant role in small business success. A leader's ability to motivate and inspire the staff determines the success of the small business. What the leader does, motivates the staff to do the same (Maxwell, 2007). In a small business, an environment of vitality and change causes the leader to generate new ideas, take risks, and exploit opportunities (Lai et al., 2020).

Leaders are individuals encouraging groups to achieve organizational success (AlOqlah, 2021). Shein (2004) defined a leader as a person adjusting the business' strategic goals to adapt to changing environments. Leaders play an essential role in

encouraging innovation in an organization (Khalil & Siddiqui, 2019). Leaders influence

job satisfaction, discourage employee turnover, and stress organizational culture and

commitment to the business (Iqbal et al., 2022; Oubrich et al., 2021). Ethical leaders are

genuinely involved in the growth and development of their staff, enhancement of their

customers' experiences, and assurance that employees make ethical decisions and follow

ethical principles in their businesses. Transformational leaders focus on motivating their

staff to accomplish set goals. These leaders encourage their staff to look beyond their

needs and focus on the needs of the small business (Khalil & Siddiqui, 2019).

Transformational Leadership

Transformational leaders aim to inspire, influence, and motivate their staff,

leading to increased employee engagement and survivability in small retail businesses

(Lai et al., 2020). The work of Schumpeter (1934), along with Burns (1978) and Bass

(1985), is the focus of an exhaustive assessment of entrepreneurs who are

transformational leaders. Frangieh and Rusu (2021) detailed that those leaders who use

transformational leadership style of motivating employees, have an impact on the

employee's performance. Transformational leaders are mentors and coaches, directing

their staff towards the achievement of shared goals (Oubrich et al., 2021).

Transformational leaders ensure their employees are working in comfortable

environments while being committed to the collective goal of the business (Oubrich et

al., 2021). There is a strong relationship between transformational leadership style and an

employee's well-being in connection to entrepreneurship in small business (Lai et al.,

2020). Transformational leaders exude characteristics that motivate, empower, and increase employee engagement. Bass (1985) expanded Burns (1978) findings by clarifying that transformational leaders influence their staff through deep honesty, steadfast loyalty, and credible trust. A leader can make a positive transformation in the life of an employee by displaying a clear, consistent, and approachable behavior (Bass, 1985).

Transformational leaders can motivate and encourage their staff to envision the same shared goals for the business and positively prompt them to be creative and innovative (Lai et al., 2020). Leaders promote this transformational style by building a creative and innovative atmosphere in which leaders encourage employees to be clear, intentional, and dedicated to achieving the collective goals of the small business (Bass (1985). Transformational leaders would kindle the critical thinking of staff, thereby motivating them to act as an essential part for the growth and success of the business.

Bass (1985) noted that transformational leaders are more than motivators. Liguori and Pittz (2020) agreed with Bass, stating that transformational and transparent leaders aim to grow their staff. Liguori and Pittz explained that leaders strive to develop employee creativity to improve the small business and its operation when the employees understand the business values and long-term goals. The leaders' ability to manage their staff and business effectively led to high levels of creative self-efficacy, which would lead to collective employee creativity and performance for the small business.

Transformational leaders create a shared vision and implement effective strategies that the staff would follow. Van Dijk et al. (2021) agreed with Bass (1985) in that transformational leaders practice leadership tactics through the following four concepts: influencing their staff, inspiring them to action, motivating them to go above and beyond, and encouraging individualized beliefs. Shein (2004) noted that transformational leaders practice these concepts to engage their employees. Leaders and their staff equally contribute to each other's advancement to higher levels of achievement through the following paradigms: influence, intellectual stimulation, motivation, and individualized believes (Burns, 1978).

Sound effect relates to the capability of the leader to provide a clear vision for the employees to practice. Transformational leaders can stimulate their staff by encouraging them to speak up, be creative and innovative, find solutions, and act (Van Dijk et al., 2021). Hannah (2020) stated that motivation exists when leaders develop an achievable plan towards a goal. Then, leaders create a strategic plan to achieve these goals, along with the conviction to achieve the goals by motivating employees to see the same-shared goals (Iqbal et al., 2022). Individuals believe that when leaders encourage their staff to develop personal relationships, leaders add value to the organizations' culture.

Transactional Leadership

Transactional leadership is a reward system used in motivating staff to perform above the normal routine (Oswald et al., 2022). Transactional leadership is a style that leaders use to focus on corrective and constructive measures of transaction (Hannah,

2020). Transactional leaders promote employee performance from providing contingent rewards for the employee to reach organizational goals (Lee & Ding, 2020). Entrepreneurs aim to be excellent business leaders by demonstrating both the transformational leadership style and transactional leadership style (Oswald et al., 2022). Transactional leaders provide a reward system for subordinates when they complete a short-term goal. Transactional leaders implement these rewards as a motivational incentive to encourage high performance (Hannah, 2020).

Another strategy that business owners use to reward their employees is to actively monitor employee performance, rectify mistakes, and magnify success (Oswald et al., 2022). Business owners could choose to manage their staff by observing employees, allowing employees opportunities to correct the mistakes made (Hannah, 2020). Business owners would intervene to commend the staff on corrective actions they have taken. These processes are diversified ways new business owners use to encourage, empower, and engage their staff. Business leaders use these processes to inspire admiration, respect, loyalty, trust, and dedication from the team of employees (Oswald et al., 2022.

Business owners demonstrate a passive and avoidant transactional leadership style that shows corrective behaviors when executed, yet reactive from the staff (Bass, 1985; Van Dijk et al., 2021). Some business leaders are unclear about the expected outcomes, the specificity of the tasks, and agreed-upon goals. This problem could lead to unproductive staff (Van Dijk et al., 2021). Although the transactional style could cause leaders to display negativism and uncertainty in the daily operations of their business,

business owners could achieve the overall purpose and outcome by promising an incentive that will improve the performance of the staff (Hannah, 2020). Business owners practice the management-by-exception transactional leadership style by using corrective measures leaders implemented.

Transactional leaders have a more positive impact on job satisfaction through the approach implemented with their staff. Employees rewarded for a job well done aim to perform more effectively and show more appreciation for the task at hand (Oswald et al., 2022). Employees become further engaged and more satisfied with the business and the business owner when they are satisfied with the leader, culture, and services or products provided. The sense of satisfaction employees obtain lead to increased quality of work, thereby improving performance on the job and interaction with the customers (Iqbal et al., 2022).

Authentic Leadership

Authentic leaders develop a strong following from their staff by having ethical, honest, positive, and open communication (Kelly et al., 2022). Entrepreneurs become authentic business leaders by personalizing their experiences with their staff and being completely honest about the experiences that shaped (Kelly et al., 2022). Kelly et al. (2022) stated that authentic leaders encourage a deep sense of self-awareness about the value and beliefs and their decision-making style. Authentic leaders are ethical and moral; they aim to motivate and inspire their employees through exemplified behaviors and personal lives (Shein, 2004).

Business leaders have to use methods of evaluation that allow for employee behaviors to be monitored and displayed to show moral and ethical intent to be genuine and selfless (Shein, 2004). Authentic business leaders are true to themselves and their staff. Van Dijk et al. (2021) stated that an authentic leader uses idealized influence, intellectual stimulation, individualized consideration, and inspirational motivation to build relationships and trust with employees. Entrepreneurs remain true to their purpose and their goals. As they lead by motivating, building a strong team, and empowering their employees to perform with integrity, ethical standards, and high morals (Van Dijk et al., 2021).

Transformational leadership, along with transactional leadership and authentic leadership, are three leadership styles that business owners use to encourage, empower, and enrich their staff to perform above and beyond in the business. Transformational leaders encourage improved performance and motivate employees (Bass, 1985). Transactional leaders motivate employees with the use of rewards systems, effective communication, and rendering support, thereby transacting high performance from the employees (Adriansyah et al., 2020). Authentic leaders motivate employees to perform above standard by observing and emulating the behavior of the business owner (Van Dijk et al., 2021). These three leadership styles are beneficial to entrepreneurs to increase profitability and sustainability in their business. Entrepreneurs practice these three leadership styles, which results in improvements to employee performance by motivating,

rewarding, and positively influencing the staff members to be their true ethical and authentic selves.

Strategic Planning

Small businesses provide about 20% of economic growth and job creation in the United States; however, very few of these young businesses existed after the first 5 years in operation. Gyimah and Adeola (2021) indicated the rise in small business owners and their untimely failure within those critical first 5 years of operation. Birbisa and Lakew (2020) agreed with Gyimah and Adeola in that to implement a successful business strategy for sustainability, business owners must determine the change that is needed for their operation to be on the path to success, before developing and enforcing new strategies. Birbisa and Lakew indicated that to apply such survival and sustainability changes, the business performance needs to increase and grow dynamically.

These survival and sustainability strategies are learned by reviewing resources, responsibilities, and knowledge used by successful small business owners to avoid common obstacles hindering sustainability. Birbisa and Lakew (2020) agreed with Gonzales-Martinez et al. (2021) that successful strategic planning can increase the number of satisfied customers, provide quality products and generate competitive capital necessary to increase business profitability. Morris and Tucker (2021) presented strategies used in implementing and increasing business sustainability, such as empowering leaders and employees, creating self-sufficient business structure, developing value, community, and a sense of belonging. Many researchers have

implemented a strategic framework approach while implementing these mentioned

changes and it increased the success of their businesses exponentially. Formentini et al.

(2019) identified strategies to obtain growth in a small business often occur through (a)

innovative strategies, (b) financial management and capital acquisition, (c) organizational

change, and (a) sustainability strategies.

Innovation

The term innovation means the introduction of a new process, in an effort to

improve its quality. Su et al. (2020) suggested that innovative behavior used by

entrepreneurs to implement change and motivate employees in an innovative manner

could lead businesses to profitability and sustainability. Having innovative products and

services in a small retail business is the key to attaining goals, making changes, and

growing lucratively. To teach self-innovation skills to small business owners and their

staff, Philipson (2020) suggested the development of habit-building capabilities acquired

while using technology in implementing and adapting to innovative skills.

Training and development is an important portion in being a successful small

business owner. Training is simply an instructional session that amplifies employees

knowledge of the business, which can lead to successful operation of any business during

the startup years (Sykes, 2020). Varghese and Finkelstein (2020) presented data on

required small business training for sustainability, indicating that small business owners

found innovative training methods as one of the strategies to engage employees.

Markowska and Wiklund (2020) encouraged businesses to become more active and

involved in the entrepreneurial aspect of owning and operating a business, leading to the direct involvement in training and development of the staff.

Falola et al. (2020) stated that training could enhance employee effectiveness, productivity, and efficiency. Creative and innovative on-the-job training would provide the employee with a keen sense of accomplishment and heightened accelerated knowledge of the topic. Little et al. (2020) agreed with Falola et al. that researchers have used well-calculated and strategically planned innovative training methods, implementing and executing strategies such as *train-the-trainer* to enhance productivity within the small business. This innovative training will create a change that will unequivocally build and grow the business (Falola et al., 2020).

Financial Management and Capital Acquisition

While implementing innovative approaches, financial stability and acquisition are essential processes for the development and advancement of small retail stores (Shafi, 2021). Small business indebtedness is one of the business problems that face owners during their first few years of operation (Kalanit et al., 2020). Ashta (2019) conducted research on the survival and sustainability of small businesses and found that financial literacy is an important aspect for small businesses and an important attribute for success. With the use of strategic framework, new small business owners invested in the knowledge needed to grow their business financially (Formentini et al., 2019). This strategy gave small business owners the knowledge on how to make an investment to

improve the flow of funds, how to maintain the fund already acquired, and how to

multiply these funds (Nguyen & Canh, 2021).

While creating strategies to grow and build a business, Formentini et al. (2019),

along with Shafi (2021) suggested the use of crowdfunding, private or personal investors,

and bank loans to obtain adequate capital for the funding of a small business. Bank loans

are mostly acquired by individuals with creditworthy background, which makes it easier

for banks to approve their loan applications for venture capital (Santos & Cincera, 2022).

With such competitive advantage, McDowell et al. (2016) indicated the importance of

having sufficient capital along with an innovative drive to build and grow a business to

achieve sustainability. McDowell et al. emphasized on the importance of establishing

financial access that brings about and supports innovative products and services for small

businesses.

Organizational Change Management

Organizational change management is the process of constantly redesigning a

small business' structure, direction, and capabilities to address the fluctuating needs of

external and internal customers (Marom & Lussier, 2014). Organizational change

managements entails entering new territory and playing the same old game by new rules

and moving the organization from its current state or incorrect practices or mediocre

performance to a more desirable improved state of operation (Ghiringhelli & Virili,

2021). Bourke and Roper (2017) defined organizational change management as going

through the process of continuously renewing an organization's direction, structure, and capabilities.

Change is a major part of any organization, no matter how small or big it is, or how competitive or relaxed the environment of the business is. With the right organizational change model, changes are methods used to modify strategies, processes, and structures of that organization. AlOqlah (2021) suggested the importance of change process, and how the change is used to convince an organization to improve from the current state of awareness to an unknown desired state of expectancy. Another known way of implementing change is through a lean manufacturing change process, which is known as a change in the system, a change in the employee personal behavior, and a change in structure (Ghiringhelli & Virili, 2021).

Small business owners implementing innovative change processes found that to have a successful and sustainable organizational change management, the business must have (a) a good supply chain integration, (b) a good leadership commitment, (c) a good understanding of training tools and techniques, (d) an adequate employee involvement, and (e) an objective business system (Birbisa & Lakew, 2020). Change management from a skill-based, self-innovated leader guides a business to achieve success through a flexible and appropriate management strategy (Ready, 2014). Strategically planned change management shows the stages required for implementing change that would be accepted and sustained in a small business.

Sustainability

Small business sustainability and survival depends on various attributes that combine to increase the performance of the small business. Strategic orientation is widely required for small businesses to be successful and withstand those critical first few years in operation (Hu & Kee, 2022). Park et al. (2020) proposed the use of aggressive, creative, risky, proactive, and defensive strategies that play major roles in small business performance levels. Tsvetkova and Partridge (2021), along with Olubodun and Agbaje, (2021), agreed with Park et al. in that owners of small retail stores that use the above mentioned innovative and proactive approaches in their business models have reported an increased productivity, enhanced efficiency, and increased performance.

Small businesses that utilize business principles grow through learning and mastering ways to establish and implement strong values into daily operation. Olubodun and Agbaje, (2021) and Grainger-Brown et al. (2022) stated that sustainability is the growth that keeps growing, without economic or environmental challenges. Strong customer service is a form of strong business principle that would also play a big role in business sustainability. According to Tsvetkova and Partridge (2021) and Watson et al., (2020), new business owners should recognize that to attract and retain their customers, the business owners must also meet and exceed most of the customers' expectation and requests. Watson et al. added that businesses obtain sustainability by upholding the business social image, providing exceptional service, and having environmental services, such as branding, culture, relationship management, and employee morale and welfare (Grainger-Brown et al., 2022).

Small business success could be the result of the entrepreneur's motivation to continue learning throughout the operational stages of the business (Little et al., 2020). Limited resources are one of the main factors that affected small businesses and continued training enabled the business to thrive beyond the critical first 5 years. Little et al. (2020) stated that subject matter trainers are required to provide training and additional resources to entrepreneurs in behavioral skills, guiding them towards efficiency within their industries. The survival of entrepreneurs depends on how well they follow the researched business principles (Blattner et al., 2021). Small business owners, involved in the increase of knowledge of their staff, improved the quality of the employees and business requirements, while continuously growing and maintaining the business presence.

Transition

Section 1 included the problem statement, purpose statement, nature of the study, research method and design, interview questions, operational definitions assumptions, limitations, delimitations, significance of the study, and a review of professional academic literature. In the literature review, I presented a comprehensive analysis of research involving business sustainability, behavioral theories researchers used to understand this topic, and other themes.

In Section 2, I restate the purpose of the study, my role as the researcher, participants, population and sampling methods, ethical concerns, research method and design, data collection, data organization, data analysis, and reliability and validity.

Section 3 includes an introduction, presentation of findings, application to professional

practice, implications for social change, recommendations for action, recommendations

for further study, reflections, and a conclusion.

Section 2: The Project

Section 2 includes the purpose statement, my role as the researcher, participants, population and sampling methods, ethical concerns, research method and design, data collection, data organization, data analysis, and reliability and validity. Section 3 will include the following subsections: (a) introduction, (b) presentation of the findings, (c) application to professional practice, (d) implications for social change, (e) recommendations for action, (f) recommendations for further study, (g) reflections, and (h) conclusion. I begin by restating the purpose statement.

Purpose Statement

The purpose of this qualitative multiple case study was to explore strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations. The sample population consisted of five owners of small traditional retail stores, located in the State of Missouri with successful experience in using strategies to survive beyond the first 5 years of operations. The implications for positive social change include the potential to reduce failures rates of small traditional retail stores, which would lead to more tax revenues for local communities, resulting in the provision of social amenities and the creation of more jobs for residents.

Role of the Researcher

During the data collection process, researchers play important roles that include securing access to participants, engaging in a productive dialogue with participants, ensuring the organization of the research process, conducting the research study, and

collecting and analyzing data (Kozleski, 2017). Kozleski (2017) stated that researchers

are the primary research instruments and, as such, researchers control every aspect of

their study, including the definition of operational terms, collection of data from several

sources, conduction and transcription of interviews, analysis of data collected, and

development of codes and themes. Researchers use several data collection techniques,

such as conducting semistructured interviews and reviewing organizational

documentation and artifacts, to enhance the credibility of their studies (Yin, 2018). I used

several data collection techniques that included semistructured interviews and

organizational documentation and artifacts to increase the credibility of this study. I

contacted the local chamber of commerce and other business leaders and asked them to

provide suggestions for potential study participants meeting the established participation

criteria for this study. I then invited five owners of small traditional retail stores, located

in the State of Missouri, with successful experience in using strategies to survive beyond

the first 5 years of operations. I have 10 years of experience as a small business owner,

which allowed me to better understand the dynamics involved in small business growth. I

used this experience to design the interview questions for this study that would generate

important information related to the phenomenon under investigation, which was small

business sustainability beyond the first 5 years of operation.

Researchers should always be aware of ethical guidelines in which to conduct

their research (Heslop et al., 2018). Heslop et al. (2018) stated that these ethical standards

are available in guidelines and standards that professional associations and review boards

enforce. *The Belmont Report* protocol (U.S. Department of Health & Human Services, 1979) provided guidelines for researchers to abide by when researching their specific topic. It is imperative that researchers abide by the ethical obligation while conducting their research studies (Finlay, 2014). *Respect for persons, beneficence*, and *justice* are the three ethical principles contained in *The Belmont Report* protocol that researchers must follow when conducting their studies (U.S. Department of Health & Human Services, 1979). Researchers must comply with the *respect for persons* principle by respecting the autonomy of participants, including those with limited autonomy (U.S. Department of Health & Human Services, 1979). Regarding the *beneficence* principle, researchers are obligated to place the welfare of their participants as a priority by avoiding any harm to participants while benefiting from the collected data (U.S. Department of Health & Human Services, 1979). Researchers must treat participants fairly to adhere to the justice principle (U.S. Department of Health & Human Services, 1979).

The Belmont Report* protocol requires researchers to adhere to ethical principles when conducting research studies, including securing informed consent from participants, assessing of benefits and risks associated with participation in a research study, and selecting appropriate participants. In terms of securing informed consent from participants, researchers must explain the content of the informed consent form to participants before asking participants to sign the form as a sign of acceptance to participate in the research study (U.S. Department of Health & Human Services, 1979). The content of the informed consent form includes informing participants of the

voluntary nature of their participation and the option they have to withdraw from the

study at any time without giving a reason or suffering negative consequences (U.S.

Department of Health & Human Services, 1979). As the researcher, I did not begin the

study without Institutional Review Board (IRB) approval. I had an obligation to abide by

(a) *The Belmont Report* protocol's ethical principles, (b) IRB requirements, and (c)

additional ethical requirements of the participating organizations. I explained the content

of the informed consent form to participants before I asked participants to sign the form. I

treated all participants fairly and ensured their confidentiality. I also explained to

participants the voluntary nature of their participation and the option they had to

withdraw from the study at any time without giving a reason or suffering negative

consequences. These steps ensured that I adhered to the IRB's ethical principles.

Researchers face difficult challenges to avoid integrating their own biases into

their research studies (Thomas, 2017). Researchers must be very careful not to introduce

a particular bias in an attempt to eliminate an already existing bias (Yin, 2018). Member

checking is a constructive strategy to mitigate bias during research process (Patton,

2015). Researchers use member checking by providing participants with researchers'

interpretations of participants' answers to interview questions and asking participants to

ensure the accuracy of such interpretations (Yin, 2018). I used member checking by

giving participants my interpretation of their answers to interview questions and asking

participants to ensure the accuracy of my interpretations. Because I recorded my

assumptions and limitations of this study, I provided information to other researchers to

assess the reliability and validity of this study. Interview procedures, an introduction and conclusion script, prompts for obtaining informed consent from participants, and interview questions are part of an interview protocol researchers use in their studies (Roberts, 2020). I used an interview protocol (see Appendix A) to conduct the interviews and to ensure that I consistently shared the same information with all participants.

Participants

Researchers should recruit the appropriate participants for their research before starting the data collection process (Yin, 2018). Researchers must ensure that participants' eligibility criteria align with the study's overarching research question (Rehman, 2021). Finding an appropriate organization and gaining access to that organization to conduct the study represent some of the challenges that researchers encounter (Grainger-Brown et al., 2022). Another major concern for researchers is to receive consent from participants to partake in the research study (Rehman, 2021). Participant eligibility criteria consist of parameters, such as years of experience and type of work, that researchers establish to include only participants meeting the established eligibility criteria (Haye et al., 2018). Participants meet the eligibility criteria if they possess knowledge and experience related to the phenomenon being investigated (Ogbari et al., 2018).

I established participant eligibility criteria based upon participants' experience in surviving beyond the first 5 years of business operation. As a result, I selected participants with a successful record of accomplishment in surviving beyond the first 5

years of small business retail store operation. I purposively selected participants in small

business retail stores located in the State of Missouri. The participants shared business

documents pertaining to successful strategies to obtain sustainability that they had

permission to share or that are publicly available. The selected participants were suitable

for this study because of their successful experiences in using strategies to survive the

first 5 years of business operations.

Researchers face several challenges when trying to gain access to participants and

their participating organizations (Olubodun & Agbaje, 2021). In order to overcome this

challenge, Ristino and Michalak (2018) recommended researchers to collaborate with the

key leaders in the organization, employ creative recruiting methods, and be clear on the

target population for the research study. Burkholder et al. (2016) suggested that having

contact with the participant shows the researcher's intentions regarding the method and

design that will be used and the setting of the study. I obtained a list of small retail

businesses in my area from the local chamber of commerce's website. I then sent emails

to potential small business leaders and invited them to participate in this study.

Collaborating with key leaders in the organization allowed me to gain access to

participants and their organizations to conduct this study.

It is challenging to gain the trust and acceptance of participants during a research

study (Robson & McCartan, 2016). To collect rich and thick data, researchers establish a

courteous relationship with participants (De Massis et al., 2018). Rosenbach (2018) stated

that researchers establish a courteous and trustworthy relationship with participants by

regularly interacting with them. To guide me in the collection of rich data, I collaborated with participants continuously to gain their trust and acceptance.

Researchers should develop a strong trust and bond with participants to create a comfortable, honest, and unbiased atmosphere for the participants (Birt et al., 2016). Developing sound rapport with participants will lead to credible collected data (Robson & McCartan, 2016). Researchers build rapport by continually engaging with participants to gain trust and confidence (Birt et al., 2016). I established an honest and open relationship with participants throughout the entire data collection process.

Researchers must select an appropriate research design in their studies that allows them to align with the study's overarching research question with the participants. (Cooper & McNair, 2020). Researchers are able to answer the overarching research question in their studies when they select participants possessing experience and knowledge regarding the phenomenon being studied (Hagaman & Wutich, 2017; Hannah, 2020). I aligned study participants with the overarching research question and selected participants that possessed knowledge and experience regarding the phenomenon being studied.

Research Method and Design

Researchers identify the research method based on the nature of a study. Qualitative, quantitative, and mixed method are the three research methodologies for conducting formal research (Yin, 2018). For an adaptable, context-sensitive, and data-driven exploration of a problem or phenomena, researchers use the qualitative

methodology (Dikko, 2016). Researchers use the qualitative research method to ask

open-ended questions using semistructured interviews (Patkin, 2020). Researchers use

the qualitative method to explore a phenomenon in its natural setting (Yin, 2018). I

selected the qualitative method to explore a phenomenon in its natural setting, which in

this multiple case study was business sustainability during the first 5 years of operations.

When the objective is to analyze numerical data or test hypotheses about variables'

relationships or differences, researchers use the quantitative methodology (Wegerif,

2019). The quantitative research method is used to display results from closed-ended

questions and statistical numbers that paint a specific picture to the topic being

researched (Lu et al., 2021). I did not select the quantitative research methodology

because I did not analyze numerical data or test hypotheses. Researchers use the mixed

method when integrating the qualitative and quantitative methodologies into a single

study to collect and analyze data and report study findings (Verga Matos et al., 2019).

Researchers use the mixed method when they want to paint a broader picture on different

aspects of collecting data for the topic (Frias & Popovich, 2020). I did not select the

mixed method because the focus of my study was not to analyze numerical data or test

hypotheses about variables' relationships or differences.

Qualitative research designs that I considered for this study were case study,

narrative, ethnographic, and phenomenological. Researchers use the multiple case study

design to explore the *what, why,* and *how* of a phenomenon in its natural setting (Pan et

al., 2019; Yin, 2018). The case study design is suitable for exploring a phenomenon or

problem, as well as its plethora of resources readily available for use by researchers

(Estrada, 2017). Researchers select the multiple case study design because it may lead to

a more in-depth and insightful case study than the single case study (Yang et al., 2020;

Yin, 2018). I selected the multiple case study design to explore the *what, why,* and *how* of

a business phenomenon, which was the survival and sustainability of small traditional

retail stores during the first 5 years of operation. Researchers use the narrative design to

explore individual or small groups' life stories (Korstjens & Moser, 2018). Researchers

use the narrative design to explore participants' experiences through their own personal

stories, making interpretations in a sequential and nonstructured manner (Korstjens &

Moser, 2018; Yin, 2018). I did not use the narrative research design because I did not

focus on participants' experiences described through their personal stories in a sequential

nonstructured manner. I did not select the narrative design because the focus of this study

was not to explore individual or small groups' life stories. In ethnographic research

design, the researcher studies shared behavioral patterns, beliefs, and language of cultural

groups (Yin, 2018). Cultural perspectives become added strategies researchers use when

collecting data using the ethnographic design (Carminati, 2018). The focus of this study

was not to explore the behavioral patterns shared by cultural groups, beliefs, and

language. Therefore, the ethnographic design was not suitable for this case study.

Researchers use phenomenological design to explore the meanings of individuals' lived

experiences about phenomena (vom Lehn, 2019). Researchers use the phenomenological

design to explain a shared pattern about a business problem after multiple participants

have been interviewed for the data collection process (vom Lehn, 2019). I did not select

the phenomenological design because I did not explore the meanings of individuals' lived

experiences about a phenomenon.

I continued to analyze data collected until I reached data saturation in this study.

Researchers reach data saturation when subsequent data collection and analyses do not

result in new themes (Hennink & Kaiser, 2022). A researcher must reach data saturation

to consider the findings of a case study to be conclusive (Chitac, 2022). I continued to

interview study participants until reaching data saturation. I continued to collect and

analyze data until no new themes emerged.

Population and Sampling

It is critical to improve the trustworthiness of my study by selecting the right

sampling method (Lai et al., 2020). To ensure that participants meet the same set of

criteria, researchers use purposive sampling to obtain information related to the

phenomenon under investigation (Hennink & Kaiser, 2022). Researchers use purposive

sampling to identify and select participants meeting the established eligibility criteria

(Kiernan et al., 2018). I used purposive sampling to identify and select participants that

met the established eligibility criteria for this study to obtain information regarding the

phenomenon under investigation, which was small traditional retail stores' survival

beyond the first 5 years of operations.

I collected data from five small traditional retail businesses located in the State of

Missouri that had successfully operated for over 5 years. Researchers suggested that in

order to determine the appropriate sample size for data collection, the nature of the study and the required richness of the data must be taken into account (Hennink & Kaiser, 2022), as well as the generalizability of the data to the larger population (Kiernan et al., 2018). Ochieng et al. (2021) stated that a good case study consists of three to five participants, while Lai et al. (2020) suggested that it is vital for the study participants to possess successful experience in the phenomenon under investigation to give credible information for the research study. Yin (2018) stated that it is difficult to determine the appropriate sample size for a case study. However, researchers should use three to five cases (Yin, 2018). Following the recommendations from the researchers mentioned in this paragraph, I collected data from five small traditional retail businesses located in the State of Missouri that had successfully operated for over 5 years.

When a researcher can no longer gather new pertinent information from the research participants, the researcher achieves data saturation (Hennink & Kaiser, 2022). Data saturation can occur when conducting four to five semistructured interviews to obtain detailed and extensive information on the research topic (Chitac, 2022). I collected rich information from research participants by conducting Zoom semistructured interviews with open-ended research questions, which led to data saturation. I contacted selected participants and secured their approval to participate in this study.

The interview setting was conducive to open dialogue with participants. Researchers ensure the interview setting is convenient to participants to reduce participants' anxiety (Williams, 2020) and that leads to the development of a comfortable

atmosphere for open dialogue and rapport-building interactions (d'Abreu et al., 2021).

Researchers should select an interview setting that is quiet and private to make the

participants feel comfortable (Ross et al., 2018). I selected an interview setting conducive

to open dialogue with participants when conducting Zoom semistructured interviews. In

addition, I advised participants to select an interview setting that was convenient for them

to reduce their anxiety and that would lead to the development of a comfortable

atmosphere for open dialogue and rapport-building interactions using Zoom. I also

selected an interview setting that was quiet and private which made the participants feel

comfortable. I informed each participant that the Zoom interview will have a duration of

approximately 60 minutes, which turned out to be accurate.

Ethical Research

An important part of any research study is for the researcher to obtain an

informed consent from participants (Rosenbach, 2018). All participants received an email

with an electronic informed consent form to participate in this research study. The

researcher outlines the nature of the study in the informed consent form, along with

participant's expectations, potential benefits and risks to participants, and the researcher's

contact information, in the instance that the participant may have any questions (Yin,

2018). Researchers must inform participants that their participation is strictly voluntary

(Rosenbach, 2018). I notified participants of this study that participation was strictly

voluntary. Yin (2018) stated that participants can rescind their participation from the

study at any time during the research process without giving any reason or having any

negative consequences. I notified the participants of the voluntary nature of their

participation and of the option they had to withdraw from the study at any time during the

research process without giving a reason for such withdrawal. The informed consent form

contained verbiage related to participants' options to withdraw from participating in a

research study at any time during the research process by simply providing verbal or

written notice without suffering any negative consequences. The privacy and

confidentially of participants should be the fundamental focus in a research study

(Thomas, 2017). I protected the privacy and confidentiality of participants in this study. I

did not give participants any reason to have preconceived ideas of what the study aimed

to achieve throughout this research study. Researchers avoid bias by ensuring to recruit

participants from diverse backgrounds without existing partnerships (Heslop et al., 2018).

Each participant was over the age of 18 and met the established participation

eligibility criteria. I did not commence with the interview process until after I received

permission from Walden University's Institutional Review Board (IRB). I ensured that

each interview centered around participants' safety and informed consent while abiding

by the guidelines provided by Walden University's IRB. The IRB approval number is 03-

29-22-0746785.

Multiple authors (Heslop et al., 2018; Ogbari et al., 2018) agreed to the use of

informed consent form, which involves the creation of the consent form and the

presentation of the consent form to participants. With the use of basic English, I created a

consent form to ensure all participants from multiple educational backgrounds could

comprehend the interview questions, as the U.S. Department of Health & Human Services (1979) recommended. I emailed a copy of the informed consent form to individuals that I identified as qualified participants and reviewed the form to their full understanding. Reviewing the consent form with each participant to ensure each participant reads and understands the content in the informed consent form is crucial (U.S. Department of Health & Human Services, 1979).

I did not use the actual names of my study participants to ensure their confidentiality. I used fictitious names for participants and their organizations, such as P1, P2, P3, P4, and P5 for the participants. I assigned O1, O2, O3, O4, and O5 to the participating organizations. I also wrote my research study in a manner that will not disclose specific information about study participants and their organizations. Heslop et al. (2018) stated that a researcher should ensure the participants receive minimal interactions with other participants throughout the research study to avoid preconceptions of the collected data. I stored all data collected on a password-protected external flash drive. I stored all the collected hard copy data and external flash drive in a locked drawer at my residence and will remained stored for 5 years. Lastly, I will abide by Walden University's guidelines and destroy the password-protected external flash drive and shred all hard copies after 5 years have passed, as vom Lehn (2019) recommended.

Data Collection Instruments

Lincoln and Guba (1985) were the first researchers referring to a researcher as the primary research instrument in a study. A researcher becomes the research instrument

when conducting qualitative research (Harkiolakis, 2017). As the research instrument, the researcher's role in conducting a case study is to collect data through the use of multiple sources, such as interviews, observations, and document analysis (Haye et al., 2018).

One of the data collection instruments qualitative researchers use is semistructured interviews with open-ended questions (Harkiolakis, 2017). Researchers conduct interviews with participants to understand the participants' experiences with the phenomenon researchers are investigating (Rosenbach, 2018). Researchers favor the use of semistructured interviews because of researchers are able to ask follow-up questions for clarification purposes (Theofanidis & Fountouki, 2019). Researchers use semistructured interviews with the goal of obtaining participants' successful experience in the phenomenon under investigation (Katainen & Heikkilä, 2020).

I conducted Zoom semistructured interviews with open-ended questions and obtained data from five purposively selected owners of small traditional retail stores located in the State of Missouri, with successful experience and strategies used to survive beyond the first 5 years of operations. Researchers must focus on the facilitation of rich data collection to ensure sufficient information is available regarding the phenomenon under study (Katainen & Heikkilä, 2020). Researchers could discover new themes when collecting rich data through the use of semistructured interviews (vom Lehn, 2019). Researchers choose to use predetermined questions for their semistructured interviews to have the opportunity to ask participants clarifying questions (Katainen & Heikkilä, 2020). I used Zoom semistructured interviews with open-ended questions and asked follow-up

clarifying questions to ensure I collected rich data about strategies used to survive the first 5 years of business operations.

I was the primary research instrument in this study and, as such, I conducted, collected, audio-recorded, and transcribed Zoom semistructured interviews to collect rich data. I used an interview protocol (see Appendix A) as a guide. I asked participants eight interview questions (see Appendix B). At the conclusion of the interviews, I asked participants to please share any additional information directly related to strategies they used to survive beyond the first 5 years of operations. Researchers asking study participants for additional information may lead to the discovery of new information related to the phenomenon under investigation that might not have emerged or simply overlooked during the interviews (Cronin et al., 2020; Theofanidis & Fountouki, 2019). Researchers integrate biases into a research study (Heslop et al., 2018; Thomas, 2017). To respond to this challenge, researchers engage in reflexivity (Motulsky, 2021; Sol et al., 2018), which is the process where researchers reflect on their own thoughts and decisions made surrounding the data collection (Sol et al., 2018). The key factor to address researchers' biases is for researchers to be able to present data without prior knowledge of the content, thereby giving more transparency to the research process (Reid et al., 2018). I managed my personal biases by engaging in reflexivity exercises to ensure I reflected on my own thoughts and decisions made regarding the data collection process.

Document analysis is another data collection technique that researchers often use (Nassaji, 2020; Theofanidis & Fountouki, 2019; Yin, 2018). Researchers have the

opportunity to delve further into the phenomenon under investigation with the use of document analysis along with interviewing participants (Haye et al., 2018). Researchers conduct methodological triangulation to increase the rigor of their studies by collecting data from several sources, such as semistructured interviews and document analysis, and comparing these data to see if data alignment occurs ((Theofanidis & Fountouki, 2019; Nassaji, 2020). Budgets, reports, and financial documents are some examples of organizational documents that researchers analyze (Haye et al., 2018; Yin, 2018). Some of these organizational documents could contain information relevant to the phenomenon under investigation (vom Lehn, 2019). I analyzed organizational documents and artifacts directly related to the phenomenon under investigation, which was the strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations.

Researchers can increase the validity and credibility of their studies by implementing member checking, which includes correcting, confirming, adding, and clarifying elements of the collected data (Cronin et al., 2020; Herger, 2021). Member checking consists of participants reviewing researchers' interpretation of participants' responses to interview questions to verify the accuracy of such interpretations (Motulsky, 2021; Nassaji, 2020). I sent participants, via email, my interpretations of their answers to interview questions and asked them to verify the accuracy of such interpretations to increase the study's validity and credibility.

Data Collection Technique

Using semistructured interviews to collect the participants' experiences directly related to the phenomenon under investigation is a common practice in qualitative research (Nelson Smith & Suby-Long, 2019). Participants describe their knowledge and expertise of the phenomenon under investigation by answering open-ended interview questions (Kaliber, 2019). Researchers gain additional details about the phenomenon being researched by using follow-up questions, after using the overarching research question to control the direction of the semistructured participant interviews (Bearman, 2019). I used Zoom to conduct semistructured interviews with open-ended questions with one participant at a time. I interviewed five owners of small traditional retail stores, located in the State of Missouri, to learn the strategies these store owners used to survive beyond the first 5 years of operations. Analyzing organizational documentation and artifacts, such as business plans and daily profit reports, is the second data source researchers use in a case study (Peesker et al., 2019). Researchers are able to conduct methodological triangulation by utilizing multiple data collection methods to expand their knowledge of the phenomenon under investigation and to enhance the intensity of their study (Kaliber, 2019). I reviewed organizational documents and artifacts, such as business plans, daily profit reports, balance statements, and monthly or annual cash flow reports, that contained information related to strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations.

Advantages and disadvantages exist when using semistructured interviews and analyzing organizational documentation and artifacts to collect data (Peesker et al., 2019). Regarding the advantages of conducting semistructured interviews, researchers using semistructured interviews could ask participants clarifying questions to give participants an opportunity to provide additional details, resulting in an improved understanding of participants' answers to interview questions (Bearman, 2019). Researchers may also review participants' collected data to ensure alignment to the research study (Hermawan, 2019). Analyzing organizational documentation and artifacts has advantages, including the fact that researchers may perform methodological triangulation, which involves the collection of data from several sources and the comparison of all data collected to determine if data alignment occurs (Headley & Plano Clark, 2020). I asked participants via email to share organizational documentation and artifacts that they had the authority to share or that were publicly available.

Another advantage of using organizational documentation and artifacts is that researchers may identify new themes or realize that further exploration of the phenomenon or related topics could lead to the discovery of new themes (Karaki et al., 2019). Another advantage of using organizational documentation and artifacts is that detailed explanations of incidents related to the phenomenon under investigation may be contained in the organizational documents, which would indicate productivity and performance leading to profitability within the organization (Hermawan, 2019). I conducted methodological triangulation by collecting data from several sources, which

were semistructured interviews and organizational documentation, such as business

plans, daily profit reports, balance statements, and monthly or annual cash flow reports. I

then compared the data collected from various sources and determined that data

alignment had occurred.

Disadvantages exist when using semistructured interviews and organizational

documentation and artifacts (Peesker et al., 2019). Study participants could experience

anxiety because they know that the researchers are audio-recording participants' answers

to interview questions (Nelson Smith & Suby-Long, 2019). Inexperienced researchers

may face difficulties due to their lack of experience in conducting semistructured

interviews (Simpson & Wilson-Smith, 2017). To please researchers, study participants

could introduce bias into the research study by responding to interview questions with

content that participants think that researchers desire to obtain (Headley & Plano Clark,

2020). Researchers may also become biased in their studies by voicing their views on the

phenomenon under investigation and by showing nonverbal cues while participants

answer the interview questions (Fiechter et al., 2018). Disadvantages of using

organizational documentation and artifacts include the possibility of the participating

organizations' employees developing biased records, depending on their own interests

(Headley & Plano Clark, 2020). Organizational documents and artifacts could be

unreliable, as the employees developing those documents may have had biases when

developing the organizational documentation (Peesker et al., 2019). Another

disadvantage of using organizational documentation and artifacts is that researchers may

not be able to obtain access to organizational documentation and artifacts, preventing the researchers from analyzing these documents and artifacts (Karaki et al., 2019). I was able to gain access to organizational documentation and artifacts. I also used publicly available artifacts, such as websites.

Researchers conduct member checking to ensure that their interpretations of participants' answers to interview questions are accurate (Yin, 2018). In member checking, researchers give participants the researchers' interpretations of participants' answers to interview questions and ask participants to review for accuracy (Karaki et al., 2019). Researchers also conduct member checking to increase the credibility of all data researchers collected (Candela, 2019). There are disadvantages in using member checking. For example, researchers may conclude that no response from participants of the study may indicate that participants are in agreement with researchers' interpretations of participants' answers but, in reality, participants might not have read such interpretations (Candela, 2019). Another disadvantage is that participants may feel uncomfortable about not agreeing with researchers' interpretations of participants' answers to the collected data, which could cause them to accept the interpretations without any objections (Hermawan, 2019). I conducted member checking via email to ensure that my interpretations of participants' answers to interview questions were accurate. I provided participants with my interpretations of their answers to interview questions and asked them to verify the accuracy of my interpretations.

Data Organization Technique

Yin (2018) suggested that creating an appropriate system to organize data is a suitable strategy before qualitative researchers analyze data collected. Researchers conduct more rigorous research when they first organize the data collected (Yin, 2018). The process of developing a consistent form of data collection begins after the researcher organizes the data (Scribante et al., 2019).

In this study, I conducted semistructured interviews via Zoom, with open-ended questions (see Appendix B), with five owners of small traditional retail stores, located in the State of Missouri, with successful experience and strategies used to survive beyond the first 5 years of operations. Researchers assign a unique code to each participant to ensure the confidentiality of participants (Alter & Gonzalez, 2018). I assigned the following codes to participants: P1, P2, P3, P4, and P5. Conversely, I assigned SB1, SB2, SB3, SB4, and SB5 to the participating organizations. I removed any information from the transcript that could identify the participants. Researchers ensure participant confidentiality by changing the names of participants, other employees, and locations (Guest et al., 2020). To ensure participants' confidentiality, I removed information that would identify a participant, transcribed and interpreted every leader participant's interview, and assigned the participant code to both the interview transcript and the member-checked document for each participant.

I had an external password-protected flash drive set aside to store assigned password-protected folders that contain electronic transcripts, notes, and observations

made during the interviews. All notes written during an interview contained the participant's unique code. With the protection and security of the data being of the utmost importance, I scanned paper files and converted them to PDF images. I assigned a document identification number to each organizational document and artifact that I reviewed. I organized organizational documentation by scanning the documents and converted them to electronic files. Yin (2018) posited that adding annotated bibliographies to the scanned documents improves the index and retrieval procedure. I included annotated bibliographies in the scanned organizational documentation to enhance organization and retrieval.

My external password-protected flash drive was used to store electronic data in the appropriate folder. Researchers use computer-assisted qualitative data analysis software (CAQDAS) to transfer raw data from the external flash drive to the computer's hard disk to improve data organization (Azeroual et al., 2018). Researchers use CAQDAS to organize and analyze raw data proficiently (Azeroual et al., 2018). Kalpokaite and Radivojevic (2020) emphasized that CAQDAS does not replace the researcher's role in organizing and analyzing the data proficiently; rather, CAQDAS improves the data analysis process. A qualitative and mixed methods web application, known as NVivo, is affordable, cloud-based, password-protected, and easy to access and use (Azeroual et al., 2018). I used NVivo when I imported, filed, and organized interview audio recordings, interview transcripts, organizational documentation and artifacts, and observation notes. Centralizing all data collected facilitated data access and analyses.

Researchers demonstrate research process transparency with the use of a reflective journal (Papasalouros & Tsolomitis, 2017). Researchers should provide adequate resources to participants containing transparent details of the process (Xu et al., 2020). A reflective journal is a tool that assists researchers when recording the research process and capturing the participants' nonverbal cues during the interviews and recording rich descriptions about the interview environment (Crittenden & Chekour, 2020). To ensure research transparency, my electronic reflective journal included aspects of the research process, such as participants' nonverbal cues during the interviews; descriptions of the setting; thoughts and ideas resulting from reviewing organizational documentation and artifacts; and coding and theme identification decisions.

Peng et al. (2020) emphasized the need for destroying data after the required time and ensuring the confidentiality and security of the collected information. The vital role of research data protection is to ensure that researchers practice the best methods to properly secure participants' collected data throughout the research process (Kim et al., 2018). Researchers recommended destroying the collected data by utilizing a self-destructive method that ensures a higher level of security for the collected data (Kim et al., 2018). Among the best practices include researchers (a) communicating the purpose of data collection, (b) securing informed consent from participants, (c) collecting information only for the purpose of the study, (d) saving data collected for the required period, and (e) securing the data collected (Kim et al., 2018).

I safely stored all data collected, including scanned hard copies, on a password-protected external flash drive and stored the hard copies in a locked file cabinet at my residence, as Kim et al. (2018) recommended. Two important ethical requirements that researchers must consider during field research are storing hard copies in a locked filing cabinet and electronic copies in either a password-protected external flash drive or a computer's internal hard drive (Kim et al., 2018; Papasalouros & Tsolomitis, 2017). According to Walden University's policy, I will keep all data collected in a locked safe for the first 5 years after completing this study. I will destroy the password-protected external flash drive and shred all hard copies after the 5-year period elapses.

Data Analysis

Researchers use triangulation to increase the richness of the data collected (Renz et al., 2018). Methodological triangulation refers to collecting data using multiple sources of evidence to compare and verify all data collected (Battaglio & Hall, 2018). Researchers conduct methodological triangulation by collecting data using several data collection instruments to increase the study's credibility and validity (Decleve et al., 2020). Researchers use methodological triangulation to obtain several angles when exploring the phenomenon under study (Mau, 2020). Researchers triangulate data collected from conducting semistructured interviews and reviewing organizational documentation and artifacts, achieving convergent evidence (Greyson, 2018). Yin (2018) expressed that case studies are strongly validated in their construct with adequate converging evidence. I used methodological triangulation by comparing evidence

collected from several data sources, such as semistructured interviews and organizational documentation and artifacts. I used methodological triangulation to confirm the validity, credibility, and authenticity of the data I collected, interpreted, and analyzed. I utilized member checking after I interpreted data collected from the semistructured interviews to ensure data accuracy. I provided my interpretations of participants' answers to interview questions to participants for review and verification. I compared the data that I member checked with the information collected from organizational documentation and artifacts and found that the data collected from various sources aligned.

Qualitative data analysis and data collection could occur parallel to each other as an interactive process (Reid & Koglbauer, 2018). Thematic, content, and discourse analysis are some of the multiple methods available for qualitative data analysis (Strang & Sun, 2020). Researchers must read the interview transcripts multiple times to fully grasp the content when using thematic analysis (Castleberry & Nolen, 2018). Researchers classify, order, and analyze collected data using NVivo, a CAQDAS tool (Borgert et al., 2019). Researchers use CAQDAS to identify themes and their relationships (Evers et al., 2020).

Researchers use the following five steps when analyzing data: (1) compile, (2) disassemble, (3) reassemble, (4) clarify, and (5) conclude (Yin, 2018). Compiling and organizing data to discover patterns and themes evident in interview transcripts occurred during Step 1. Researchers should code and analyze their research data using NVivo (Evers et al., 2020; Wilk et al., 2019). NVivo is a tool used by researchers to quickly

organize, code, and classify data collected (Wilk et al., 2019). Disassembling the data before assigning specific codes to the data collected takes place in Step 2. In step 3, researchers engage in reassembling and reorganizing collected data by themes. Researchers use thematic analysis in Step 4, a method that validates interpreted data collected after recording interview transcripts (Yin, 2018).

Researchers using the qualitative method choose thematic analysis when identifying patterns and themes from the collected data that could help researchers answer the overarching research question (Castleberry & Nolen, 2018). During the data analysis process, I used NVivo 12 to organize data by themes, code, and interpreted data from interview transcripts and organizational documents and artifacts. I also used NVivo 12 to group codes, map themes, and identify relationships between the themes. Researchers use member checking and thematic analysis when validating the interpreted data with the study participants to increase accuracy (Greyson, 2018). I checked for the accuracy of the interpreted data collected from participants by using member checking. I presented my interpretation of the participants' interview answers and asked participants to verify the accuracy of my interpretations.

Researchers conducting case studies use multiple data sources to explore a phenomenon (Ehrmin & Pierce, 2021). Yin (2018) emphasized the importance of using triangulation to increase the richness of the data collected. Methodological triangulation is a method that researchers use when validating multiple data sources collected through semistructured interviews and document and artifact review (Roberts et al., 2019). The

triangulation method required a second data source, which was organizational

documentation and artifacts. Document analysis is a process that researchers use to

analyze documents and artifacts (Marvasti, 2019). Some examples of document analysis

methods are thematic analysis and content analysis (Schreier et al., 2019). I analyzed

organizational documentation and artifacts using content analysis. The researcher is

required to systematically categorize identified codes and emerging themes when

utilizing content analysis (Schreier et al., 2019).

Preparing, organizing, and reporting are the three data analysis phases for content

analysis (Marvasti, 2019). I used methodological triangulation to collect the data from

conducting semistructured interviews and analyzinh organizational documentation and

artifacts. In Step 5, researchers answer the study's central research question by

developing conclusions and recommendations that emerged from the study's findings

(Yin, 2018). I collected and assembled the data collected, disassembled the data using

codes, reassembled the data collected using themes to understand the phenomenon under

study, conducted thematic analysis to interpret the data collected, and developed

conclusions and recommendations from the study's findings.

Researchers map the relationships among the emerging themes to concentrate on

main themes and correlate these themes with current literature and the conceptual

framework to answer the study's central research question (Moretta Tartaglione et al.,

2019; Yin, 2018). To properly correlate key themes into the collected data, researchers

should label the coded data (Kant & Shrutika, 2020). To determine the thematic codes'

statistical occurrence in each data category, researchers must conduct frequency analysis of the collected data (Al-Fedaghi & Mohamad, 2019). By utilizing the Nvivo 12's data-coding feature, I enhanced my case study's trustworthiness by mapping the key themes into the appropriate data categories. Researchers acquired links to current literature, methodology, and findings, using the study's conceptual framework. I correlated the main themes with current literature and the study's conceptual framework, which was entrepreneurship theory.

Reliability and Validity

Researchers address Lincoln and Guba's (1985) four criteria, which are dependability, credibility, transferability, and confirmability, to establish validity and reliability in a qualitative study. Researchers view Lincoln and Guba's four criteria as necessary components to ensure that a study is trustworthy (Korstjens & Moser, 2018). Qualitative researchers ensuring that a research study is trustworthy address the equivalent of reliability and validity requirements of a quantitative study.

Reliability

In qualitative research, it is imperative to have reliability in a case study. Researchers will need to provide convincing and reliable results using reliable instruments (Strahl et al., 2019). I used semistructured interviews and company documentation to establish reliability in this case study, as suggested by several researchers (Collins & Cooper, 2014). Yin (2018) emphasized the importance of case study researchers knowing that all data sources are complementary and understanding

that one data source does not supersede the use of all other sources. Therefore, I used multiple sources for data collection to achieve reliability.

Dependability in research is the capability to be available, reliable, maintainable, durable, and safe while conducting research and organizing the information found (Serpanos, 2019). To increase dependability in this study, I used the same interview questions in all interviews, as Bearman (2019) recommended. I used member checking to ensure the data's dependability, as Candela (2019) suggested. Member checking involves providing study participants with the researchers' interpretations of the answers that the participants gave during the interviews and asking the participants to check the information for accuracy (Candela, 2019). Member checking is an appropriate data dependability improvement method to avoid biases the researchers may have integrated into the data collected (Serpanos, 2019).

A strategy that is beneficial to researchers is to record the interviews because researchers have the opportunity to review the recordings and reflect on participants' answers, leading to the production of more reliable transcripts and themes (Bearman, 2019). I encouraged the study participants to further explain their answers in abundant detail, thereby eliminating any possible bias from my interpretation. When the given answers were too narrow and uninformative, I persuaded the participants to elaborate on their answers to provide more depth and content. I did not share details about the case study with participants, which eliminated the possibility of tainting participants' views before the interview, thereby increasing the reliability of the data collected, as Korstjens

and Moser (2018) recommended. I used the interview protocol and avoided adding new interview questions to achieve consistency and increase the reliability of the data collected, as Korstjens and Moser suggested.

Validity

The research validation framework includes credibility, transferability, and confirmability (Prasad, 2019). Researchers using the case study design use multiple data collection methods to compare the collected data to ensure data alignment (Peesker et al., 2019). A researcher analyzing data establishes the credibility of the analysis by collecting data that are inclusive and represent the entire data (Prasad, 2019). Researchers establish credibility when they read the transcripts very carefully (Aradau & Huysmans, 2019). To establish credibility for this study, I reviewed the transcripts from the interviews for an accurate depiction of the participants' descriptions and perceptions. I then compared the information within and across the case study participants. Before analyzing the data, I performed member checking to ensure the data's validity after I collected and transcribed the data, as Prasad (2019) suggested. I conducted member checking by providing participants with my interpretations of their answers to interview questions and asked participants to verify the correctness of such interpretations.

Transferability is a pertinent adaptation of the findings from one study to another study (Qin & Lu, 2019). To increase the transferability of the study, case study researchers should provide results of high quality by (a) screening study participants, (b) conducting thorough data analyses, and (c) presenting the results clearly and insightfully

(Yin, 2018). I increased the transferability of this study by screening study participants, conducting thorough data analyses, and presenting the results in a clear and insightful structure.

After the establishment of dependability, credibility, and transferability, the next process is confirmability (Lipscomb et al., 2019). Confirmability is the process by which a researcher shows that the collected data accurately reflects the researcher's interpretation of study participants' answers to interview questions, and not the researcher's views, which would integrate bias into the data collected (Cain et al., 2019). I carefully listened to each participant's responses to interview questions and documented my perceptions, perspectives, and biases. I transcribed the collected interview answers as precisely as possible, being careful in connecting data to results, and then reviewed existing literature to improve the confirmability of the results.

Methodological triangulation is a technique that increases the validity of a case study (Fusch et al., 2018). Researchers use methodological triangulation by comparing the data collected from several sources to determine if data alignment occurs (Cain et al., 2019). I used semistructured interviews, organizational documents, and organizational artifacts to collect data and compared all data collected. I found that data alignment occurred. The case study design is rooted in the collection of data from numerous sources; therefore, researchers use methodological triangulation as the main tool to increase the validity of case studies (Fusch et al., 2018).

I continued to analyze data collected until I reached data saturation in this study. Researchers reach data saturation when subsequent data collection and analyses do not result in new themes (Hennink & Kaiser, 2022). A researcher must reach data saturation to consider the findings of a case study to be conclusive (Chitac, 2022). I continued collecting and analyzing data until no new themes emerged.

Transition and Summary

In Section 2, I restated the purpose of the study, explained my role as the researcher, and described participants, population and sampling methods, and ethical concerns related to this study. Additionally, I provided a justification of the research method and design and discussed my procedures for data collection, organization, and analysis. I concluded Section 2 with a description of reliability and validity concerns as they pertained to this study. Section 3 includes an introduction, presentations of findings, applications to professional practice, implications for social change, recommendations for action, recommendations for further study, reflections, and a conclusion.

Section 3: Application to Professional Practice and Implications for Change

In this section, I provide information related to the purpose of this study. I also include the study's research question and the findings. Specifically, I include discussions regarding the following subsections: (a) the introduction, (b) a presentation of the findings, (c) the application to professional practice, (d) implications for social change, (e) recommendations for action, (f) recommendations for further study, (g) reflections, and (h) conclusion.

Introduction

The purpose of this qualitative multiple case study was to explore strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations. I conducted Zoom one-on-one interviews with five small business owners, each with experience surviving beyond the first 5 years of operations. I also collected supporting documents such as balance sheets, annual returns, and annual reports. The following two themes emerged from analyses of data collected: community involvement improved business visibility and availability of financial resources generated logistical inventory and an increase in advertisement resources. Theme 1 includes three subthemes, which are community events, hosting events, and customer surveys. Theme 2 has three subthemes, which are obtaining funds for operation, managing inventory, and advertising.

Presentation of the Findings

The overarching research question for this qualitative explorative multiple case study was: What strategies do owners of small traditional retail stores use to survive

beyond the first 5 years of operations? To answer this question, I conducted

semistructured interviews with five small business owners of traditional retail stores in

the State of Missouri with successful businesses operating beyond the first 5 years from

opening. I also reviewed organizational documentation and artifacts provided by the

participating small business owners. These documents allowed me to conduct

methodological triangulation by comparing data collected from conducting

semistructured interviews with data collected from my review of organizational

documentation and artifacts. As a result, I was able to verify that data collected from

several sources aligned well.

Theme 1: Community Involvement Improved Business Visibility

The first and main theme that emerged from data analyses was that community

involvement improved business visibility. Community involvement varies from being a

prominent leader in the community to participating in community events and

volunteering for community services. The five business owners (P1, P2, P3, P4, and P5)

that participated in this study emphasized the importance of community service in the

improvement of business visibility and sales in their businesses. All five participants

engaged themselves in community events and attracted community attention to their

businesses. All five participants also hosted events at their places of business, invited

community members, and provided community awareness about their products and

services. Another strategy all five participants discussed was collecting customer surveys

on products and services, which allowed business owners to adjust inventory and

improve services. These strategies improved customer involvement, led to high visibility

and increased sales for their respective businesses.

Community Events

P1, P2, and P4 stated that community involvement improved business visibility,

which is the single most crucial strategy for successful business growth. All five

participants stated that a well-executed business event is guaranteed to attract customers,

retain customers, and increased sales because once customers are treated exceptionally,

customers talk about their positive experiences with others and often return for more

products. P1, P2, and P4 selected community events that align with their business

purpose and mission to display a vendor table containing information about their

businesses' products and services, resulting in increased exposure to the visiting guests at

these community events. Guests visit the participants' businesses, make immediate

purchases, place orders online, and share the information with family and friends.

P1 and P4 indicated the importance of interacting with the customers at

community events, leading to customer engagement with the products, customers' visits

to their place of business, and customers' returns to make additional purchases at the

business. P5 first expressed that community involvement led to increased visibility within

the community. The convincing way P5 responded to the question indicated that business

visibility was the main key strategy for any business survival and sustainability. P1 and

P4 noted that attending community fairs, community vendor events, and community

festivals were all adequate venues of exposing the community to their unique products.

P1 and P4 did not carry products that were popular and in demand by customers; instead, they carried unique products. To draw customers' attention to these products, P1 and P4 actively approached potential customers at community events and placed their products in their hands. Visibility of their products is the key to success for a small retail business. Business owners engage in innovative strategies that make a statement about the visibility of their business (Lauri, 2021).

Retail businesses focus on visibility by delivering an experience through the products sold in that business. All five participants stated that they depended on innovative strategies and selling of services to attract customers and increase visibility and sales for their businesses. Innovative strategies in small businesses are essential to improving profitability (Laguna & Razmus, 2019). P3 is a prominent leader in the community; P3 is proud of being involved in community activities and events bringing people together.

Without necessarily having a vendor booth to showcase SB3's products, as a community leader, P3 gets the opportunity to interact and network with the people in attendance, building a relationship and sharing product and services with others. This interaction persuades the community to visit P3's business and, therefore, supports and patronizes the retail store. In turn, this relationship between the business owner and the community grows the revenue and further acts as a medium of advertising for the business. P3 stated that honesty and integrity are vital ingredients to building customers' trust. Once the business owner establishes trust and relationships with customers, the

community will visit and support the business. All five participants passionately stated that customers' interactions are essential to business growth.

P4 expressed passion in attending community vendor events. From the initial stages of registering SB4 to becoming a vendor, P4 carefully selected activities that would be more captivating to customers. P4 carefully planned the display and product selection to ensure visitors learned a story from each product and that the impact of the product motivated the customer to purchase an item and return to make additional purchases. On the day of the fair, additional coordination with P4 and SB4's staff ensured that staffers brought products to the fair in a timely manner and displayed products in an attractive and enticing manner. Then, P4 and the SB4's staff practiced sharing the conversation in a confident and intelligent way. When customers started visiting the vendor booths, P4 made eye contact and approached the customers, encouraging them to hear the story about the product or service. All products came from a different country, made by a mother or daughter striving to survive and feed the family. P4 told the customers stories about the unique way the developer made the item, about the developer, and the journey the product went through to arrive. Such stories captivated customers because the sellers show the joy and excitement they feel about each product and its respective background. With each interaction, P4 gradually built trust and relationships with the customer. The customer would make a purchase, take it home, and share the rich history with their family and friends, and in a few days, another customer would search

for the SB4's online store for similar items. Such a journey-built community created awareness and increased visibility for the small business.

P4 explained that customers visiting the SB4 booth marveled at the products and were eager to make a connection by making a purchase and following up with a promise to visit the brick-and-mortar or online stores to browse for other appealing products. P3 elaborated on the connections that made with those customers that attended community events and the way attendees displayed fascination when talking about SB3's business and the displayed products. A significant number of interactions led to a business and discount card and an invitation to the local store. While interviewing P1, I learned that SB1's main strategy was putting the products into the hands of the customers. P1 thoroughly explained that their products were not something that everyone needs; instead, they were something that individuals wanted. If participants did not place the in the customers' hands and introduce the products to the customers, these customers may walk by and not realize the product was something they would like to purchase. P2 stated that this approach provided a more direct experience with the customers, as customers touch the products, put on the clothing, or look at themselves in the mirror across from the room. As a result, the customer immediately felt a sense of attachment and ownership. This feeling motivated customers to request additional information for measurements and the timeline for product readiness, along with the overall cost, all from the experience of touching and feeling. This process required being personable with the customers and building a relationship with them.

P5 stated that the success of P5's services and products was a measure of the interactions between the staff and the customers. When the customers felt appreciated and welcomed, they ventured further into the products' details and ways the product suited them. The business owner and staff built trust and relationships with the customers. The challenge for P5 is to be creative and innovative with products and services to increase visibility, productivity, and sustainability. Sinha and Fukey (2021) stated that business visibility is an essential tool that could bring customers to the business, leading to increased profitability. High visibility encourages customers to visit the small business and make a purchase while building relationships that will yield additional profitability.

P4's efforts were committed towards growth and sustainability strategies, leading to a complete focus on the innovative strategies of community involvement and business visibility. I reviewed organizational documentation and artifacts and found that the balance sheets and annual reports corroborated my findings and conclusions from the individual interviews conducted with the five participants. For example, balance sheet reports from 2 adjacent years showed 25% to 30% slight growth and an increase in the net profit from the small businesses, because of integrating strategies used to survive the first 5 years of operations. Watson et al., (2020) recommended gradual growth for small business survival and sustainability. In addition, P2, P4, and P5's reports included revenue increases from activity increase after a community event. Customer awareness was evident in my review of balance sheets and annual reports. An increase in sales

indicated that presence and visibility is at 100% high, resulting in returning customers

and new customers visiting the brick-and-mortar and online small businesses.

I found in P2's report a slight 22% decline in the middle of the year. However,

participants attributed this decline was to a different business challenge from 2020. The

slight decline increased substantially by 35% the following year, immediately following a

community event in which SB2 participated. Sinha and Fukey (2021) indicated the

importance of business visibility, as visibility is critical to a growing business

performance, connectivity, and profitability. Business leaders should constantly manage

and improve customer awareness tools and ideas to achieve success and sustainability.

Hosting Events

P1 provided detailed insight into the purposeful planning of hosting events to

increase business visibility. Firstly, P1 hosted multiple events a week at SB1, thereby

creating the environment for the customer to shop and mingle. Secondly, P1 provided

guests with the opportunity to host their events at the brick-and-mortar store space. These

events included birthday parties, corporate events, girls' nights out, guys' nights, business

meetings, and others. The primary strategy was to draw customers into the business for

visibility. While hosting these events, the guests perused the store and purchased more

products for themselves and their loved ones. P1 stated the following, regarding

customers:

> Missing that element of a gathering place. The other growing market we saw was
>
> that craft beer and craft cocktails were growing, and we decided to kind of

connect the two and, you know, open a comic bookstore and bar. So that way we can kind of take advantage of both markets and say, you know, our customer base is over the drinking age, and we're the only people that would be in this market doing it. Let's play it up. So we started selling beers and cocktails, which has gotten very popular since 2017.

With the availability of event space, including a bar and purchasable merchandise, this strategy made SB2 an ideal location for community gatherings. This strategy was another creative approach to bring the customers closer to the vicinity of the brick-and-mortar store and the products. P1 elucidated the profit increased for SB1 once they started hosting community events at their brick-and-mortar store. Likewise, P2 identified a growth spurt in the business once SB2 hosted community events.

P1 and P2 believed in the innovative strategy of hosting events at their small business locations, which proved to be lucrative. With every event hosted, there was a chance for a 35%-45% increase in sales reported in that month's statement. P2 stated the following text regarding the importance of hosting customers at the local store:

I do not have common products that can be bought at fairs or online without it being tried on or touched. Having guests at the store gives me the chance to introduce to them my products and have them touch and feel it. When the event is over, they may choose to make a purchase on that same day, or they may choose to return another day. Most of the time, they return.

Lauri (2021) stated that business visibility requires meticulously showing the business' products and services to the customers. P3, P4, and P5 did not allude to hosting events at their location. However, they agreed that any innovative strategy to bring customers to the vicinity of the business is a genius approach to increase revenue and provide service to the community.

P1 acknowledged that hosting events at the local store generates an additional 35% revenue for the specific month it is hosted. However, the effort required to plan and execute the event sometimes adds to the pressure of unfolding the event exceptionally well. Hosting an event requires additional staff on location and decoration or rearrangement of the furniture, ensuring enough inventory is available and ready, as well as time management. P1 raved about the number of events they host at SB1 continuously and the power of interacting with the community as they enter the business place only to discover the tiny treasures hidden behind those doors, waiting to be discovered. When asked about modifications that were made to strategies (question 4), P1 stated:

> We very much had a kitchen-sink mentality about our events being more here, but we try to schedule as many different events as possible so we can bring in as wide of a community as we can. Our customer base is our free advertising. You don't have to take out Facebook ads, you don't have to take out ads in the papers. If we find people who want to host events, they will then tell their friends and family to come to the store to support the event. Once they buy something at the store, we then have them in our email base, and we can then reach out to them again and,

you know, have them buy other stuff. The kitchen-sink mentality, we just really

adopted the idea that we're going to see how things go. And if they don't work

out, we're going to get rid of it as quickly as possible.

P1's primary strategy for SB1 to improve customer experience in its local store is

to provide an escape into the comic world. P1 stated that this approach provided an

experience that most retail stores in that genre do not provide. SB1 is the second store in

the city that provided the same products; however, SB1 is the first one to sell these

products with a bar, an added experience that captivates the customers and takes them on

a journey of discovery. P1 emphasized the complete experience that awaits customers

once they attend an event at SB1. Customers leave feeling like they are superheroes in

capes. P1 elaborated, "the phrase I like to use is that you know, there's a hero in all of us;

we just need to find the courage to put on the cape, and that is something I think a lot of

folks do."

P2 explained that shortly after SB2's startup and the move to a larger storefront,

the need to host events and draw customers in to see, touch, and feel the products arose.

This decision led to the innovative strategy of hosting events and introducing the

customers to the unique nature of their products. While reviewing P2's annual reports

from 2 consecutive years, I found a 15-35% fluctuation in sales, increasing and declining,

that later steadied out before increasing to finish the year with a 45% increase over the

previous year. Small businesses' revenue fluctuates, regardless of the variety of the

products sold or services rendered. This is the nature of retail businesses. Therefore,

small business owners are creative, innovative, and receptive to changes, as they form new strategies and eliminate old strategies. P2 clarified the answer about providing great customer service that would, in turn, lead to customer appreciation and exposure for the business. Ensuring visibility in the community by relating to customers and building a relationship with them are ways in which P2 achieved visibility in the business. P2 expressed the following regarding ways to achieve visibility:

> I went to see all my clients instead of them coming to see me. Their time was more valuable. Furthermore, I find guys love that. So many strategies I kept in place, modified them somewhat, but being willing to completely change parts of the strategies. I still maintain the same business strategy of lean and mean and customer service first, and I went to see all my clients instead of them coming to see me. Their time was more valuable. I think instead of it being a slogan, it should be a mantra, and that is always put the customer first. It doesn't mean they're always right. It means they are first before the organization, before the salespeople, and before the owners. They should be first in line for everything and made to feel like they are first in line. So that is the difference I think between a successful business and one that's out of business, or just kind of floundering because they don't really understand that idea of customer first in all things.

I reviewed organizational documentation and artifacts and found that small businesses consider their fixed expenses while also calculating the operating cost of hosting events at their local stores. Once the expenses are settled, the remaining balance

can be allocated as a profit from the events. P1 and P2 identified the importance of hosting events at their small businesses and the potential revenue generated by a community event at their stores. With this vision, equipped with ideas and able staff, P1 and P2 dedicated their focus to planning and hosting community events at their retail stores and, in the process, drawing more customers in and generating more revenue for their businesses. Liguori and Pittz (2020) suggested that the interaction between customers and businesses is the single most creative way to build a strong relationship and motivate the customer to return again and again.

Customer Survey

P3 expressed that the increase in service at SB3 was due to continuous communication and customer interaction. SB3 is structured so that, as customers purchase products, they are asked about the service as well as potential products that could be added to the shelves. In addition, they are asked for their honest option about the nature of certain products and if those products should be brought back or removed from the store. The information collected from customers formally and informally is then implemented into inventory purchase. This interaction gives the customers a sense of power and belonging to the retail business. Such a gesture encourages the customer to scout out the suggested product, which in turn motivates the customer to return for more purchases. Customers would inform others about the products and services, leading to free advertisement. During the interview, P3 was asked what strategies were used to survive successfully beyond the first 5 years of operation. P3 said:

I had to make sure that I got to look up community social events. Moreover, one

thing that I forgot to mention is that it is more or so a community store, so I have

to be involved in community social events. Absolutely. Feedback from the

customer is always needed because feedback from the customers is critical, it is

very critical. I have to ask them, how do you feel? What do you need? What do

you want that I don't have? What do you want us to get? What do you think about

the prices? I tried to make sure to get proactive customer involvement. See what

they say, you know, we just don't wait for a reaction or a request. I asked them

ahead and see what they think, to have a feeling of what the customer wants.

P3 and P5 expressed the importance of creating a conducive environment for

service that will encourage the customer to return. A welcoming and favorable

environment would encourage the community to participate and interact with the owner,

the staff, and other customers. To build and maintain the trust and confidence of

customers is a great strategy that would encourage customers to participate in the survey

and assist in boosting the sales and service of the business.

P5 had a strong opinion on effectively interacting with customers by answering

the phone. Customers interact with staff by voicing their opinion about potential products

they would like to see upon their next visit. P5 stated:

Answering that phone is critical. Sure, people click on your listings from all over

the country, especially in your advertising area, because you know we also have a

certain mile radius where our listing pops up with Google before it starts

dissipating unless they're specifically looking for us. But people can call you

from anywhere and everywhere. Answering your phone is critical in this industry.

Because they're looking for something special.

P5 agreed that customers' opinions are the main reason SB5 has grown and

sustained for over 10 years. After I reviewed organizational documentation and artifacts

for SB5, I found a 42% increase in sales, the increase signifies that interacting with the

customers and implementing their suggested ideas are vital strategies to practice in retail

stores. Ikeziri et al. (2019) expressed the benefit of continuous improvement with

customer interactions, which enables small businesses to enjoy a competitive position and

keep their customers engaged and returning to the business. It is crucial to derive

information from the community as they aim to enhance and improve customer

involvement with the business and in return increase visibility (Ikeziri et al., 2019). Small

business owners engage in continuous improvement within the community, and this

effort adds value and promotes visibility of the business (Ikeziri et al., 2019).

The organizational documentation and artifacts that I collected and analyzed

included an increase in sales, which were primarily generated from the personal

interactions these five participants had while promoting and ensuring their businesses

were visible and active in the community. There was a 25% increase in customer

participation for SB3, as P3 involved the customers in the product inventory process

through data collection. Out of the five small business owners interviewed, only P3 and

P5 indicated utilizing customer surveys to collect data on customer experiences. P1, P2

and P4 relied on interacting face-to-face with the customers and hosting community events. All five participants relied on attending and participating in community events. P3 and P5 both reported an increase in the presence of the customers that visited the retail stores in search of the items that they suggested or recommended through the customer survey that was collected. Collecting online and paper surveys or asking face-to-face questions on improvement strategies to implement in a retail store are all versions of customer surveys that should be implemented to determine growth patterns and increase sustainability.

Correlation to the Literature

The findings summarized in Theme 1 correlate with Voegel and Voegel's (2020) statements that the visibility of the retail store within their respective communities could significantly increase the profitability of the small business. In addition, Lipscomb et al. (2019) confirmed that the relationship built between small business owners and the community was more about establishing credibility rather than generating income. Therefore, small business owners should focus on researching diverse strategies to engage the community while raising awareness of their retail stores, as suggested by Morris and Tucker (2021). All five participating small business owners found creative and innovative ways to enhance customer awareness, encourage customer loyalty, provide customer experience, and improve business sustainability.

Correlation to the Conceptual Framework

Theme 1 correlates with Schumpeter's entrepreneurship theory in that customers support a small business that exemplifies exceptional community involvement and visibility. Small businesses appreciate innovative strategies conducive to building customer relationship, improving community awareness, and increasing performance reports (Lauri, 2021). Schumpeter (1934) stated that business owners sustain their entity by ensuring visibility in the community, procuring abundant capital, providing adequate products, and using effective marketing styles to sustain the business. By properly executing customer awareness activities, managing funds, and managing resources, small business owners could implement key strategies that improve the success and sustainability of a small business (Schumpeter, 1934). Business owners improve their business performance by passionately enforcing business strategies, which fuels their motivation to determine strategies for success in their business, hence the provision and involvement with community events (Schumpeter, 1934).

Theme 2: Availability of Financial Resources Generated Logistical Inventory and Increase in Advertisement Resources

The second theme that emerged from data analysis was that availability of financial resources generated logistical inventory and an increase in advertisement resources. Logistical inventory refers to having the right products and the right number of products to support the entire operation of the business (Gonzales-Martinez et al., 2021). Having capital to start and operate a business is an intrinsic part of any small business.

For successful operation of a small business beyond the critical 5-year mark from startup, all five research participants agreed that having capital is a valuable part of operating and managing their businesses. The success of a new and sustainable business is likely due to the number of resources the owner secures for the initial operation of the store (Jakhar & Krishna, 2020).

P1 proclaimed that SB1's success could be credited to the availability of a silent partner that funded their operation. P1 gave credit to the bank that finally gave P1 a loan after a few denials. P3 and P4 had the determination to work full-time jobs that helped fund their full-time businesses which were operated with the help of family members so they could still focus on their full-time jobs. P5 was fortunate enough to buy off SB5 from the previous owner, which resulted in less initial capital and more toward the transfer of ownership. I identified three subthemes: obtaining funds for operation, managing inventory, and advertising.

Obtaining Funds for Operation

P1 explained that obtaining funds to start and manage SB1 was done through a partnership with a silent partner. The silent partner funded the operation of the business while P1 managed and operated the business. P1 did not go into further detail about acquiring a silent partner. However, P1 mentioned that it was a fortunate opportunity to have the full support of a partner to fund the store's operation. Despite this declaration, P1 noted that, without the financial support of the silent partner, startup operations and management of the store would have been difficult to handle during the beginning phases

of the purchase and restructuring of the business. Small businesses have an extensive list of characteristics required to be successful, such as motivating employees, possessing exceptional managerial skills, having strong innovative skills, and obtaining financial support (Ahlstrom et al., 2019).

SB1 was not a brand-new business. SB1 was purchased from a previous owner and then restructured to suit the ideas and plans of the current owner, P1. With the added purchase of the second store, P1 was able to secure the funds again through the support of the initial private partner, thereby leading to the operation and management of two stores under the same structure. P1 was the only participant that had the opportunity to be supported entirely by a private silent partner. However, P5 was fortunate enough to purchase an already-established business, as was P1.

P5 stated that transitioning from being a staff at the store to becoming the owner was intriguing. SB5's previous owner was not really paying attention to the store operations. While P5 was already well invested in the business, the interest was shared with the previous owner, leading to the transfer of ownership. P5 did not indicate the use of private donors or private loans to manage the operations of SB5 further. Financial stability for businesses signifies the consistency in which leaders manage and operate their businesses successfully (Jakhar & Krishna, 2020). P1, who purchased out ownership from the previous owner, stated,

> I understand how loans and personal financing work. You know, we have a
>
> partner that can fund our shortfalls, which is good, so that's very important, but

also understanding kind of what your costs are and how to maximize profits is kind of the most important thing. We knew we had to find a way to sell what we had in store without bringing in new items.

P3 and P4 were the only participants who utilized personal loans, family loans, and personal funding to finance their small retail businesses. P3 and P4 had full-time jobs along with operating their stores, and income from those jobs was used to start, manage, and operate SB3 and SB4 respectively. P3 owned and operated a full-time pharmacy while financially supporting SB3 from the income generated through the previous full-time business. The physical operation of the retail store was possible through the added help of family members and part-time employees dedicated to the business's successful operation. With available financial support, small business owners tend to have more flexibility and ownership to structure and restructure their retail stores to best suit their innovative ideas and goals (Formentini et al., 2019). P3 indicated:

I'm trying not to borrow or spend unnecessary money when I have no need. I try to manage inventory, my expenses, and my bills. So those are the most important things in managing my finance in operational finance. Because when you first started, it was tough and rough. So I didn't expect to have the income to sustain myself, at least to maintain the operation of the business. So that is very, very significant. My staff is mainly relatives, in the sense that I try not to take too much staffing.

P3 admitted that, while managing the financial resources available, the staff could work with P3 on limiting the expenses and managing the resources to maximize available resources and grow the business gradually. This strategy allowed P3 to redirect funds toward urgent areas while minimizing costs in areas that could be managed with fewer resources. P3 advised that business survival depends on the appropriate allocation of funds, managing funds in a manner that is not wasteful, and learning to spend only when necessary.

Another participant that worked full-time while financially supporting the retail store was P4. In this case, P4 worked for another organization while directing funds toward SB4. However, SB4 was originally a mobile store that P4 moved about from one vendor event to another. This process was the initial strategy for the business until years later when P4 invested in a retail space. Gonzales-Martinez et al. (2021) indicated the importance of self-financing geared towards promoting economic growth for the business owners. The funding for the retail space and expansion of the business was acquired through personal financing from full-time employment, along with funds received from loans given by family members and other financial institutions under a personal name.

With these funds, P4 built up the business into its innovative goal to be a popular retail business for customers and other businesses. P4 developed the strategy to sell the products not only to customers looking for items to decorate their homes, but to businesses looking to sell authentic international products to their customers. This strategy generated funds more quickly than selling to customers only. P4 redirected these

funds to the business and continued to expand and replenish the funds loaned from family members and financial institutions. P4 stated:

> So one of the things that we noticed because of the nature of how I was doing business, from festivals, we were closed in the winter. Nothing happens in the winter. And I decided that there are other parts of the world that are open in the winter. So I started wholesaling. I started reaching out to customers and dropping them in the retail shops instead of the wholesale business. That could keep us going when the festivals are not open. So that helped solve the issue of not having an all-year-round business but generating continuous profit. The second thing is inventory, and I cannot stress that enough. So those two are the main ones.

P2 had a similar experience as P4's, starting from the beginning with only the funds generated from the sales and with personal and family loans. However, years into the business and the growth rate, P2 began to sustain the business progress. At that point P2 decided it was time to secure a fixed location and expand the business. This growth led to P2 acquiring a business loan from a financial institute. P2 noticed a continuous proliferation in the customers' need for a physical location to meet and try on clothes. This change led to searching for retail spaces until P2 found a retail space where the owner was on the verge of going bankrupt and eager to lease the space at a discount. Ten years later, SB2 was operating from that location. P2 emphasized that SB2's growth was not instantaneous. At that time, P2 operated from home and met clients in their homes

before needing the larger retail space. P2 elaborated on the journey that led to the application and approval of the business loan to lease the large retail space:

> I went to a smaller bank and talked to the manager there. And he said, "Well, if you walk in and come in with a business plan, we will consider you." So, I went back and went through every step of creating a business plan. It was probably five inches thick, and my goals for the next five years, cash flow projections, and goals I wanted to meet. Where I could save money, maybe where I could spend money to make money, not spend it to spend it. Plus, you're not just wasting money on frivolous things that don't bring a return back to you. So, I went and presented my business plan, and he was very impressed and opened up MasterCard and Visa merchant accounts, and sales jumped probably 40%.

The business loan application process is lengthy, and financial institutes require a plethora of documentation and forecasted reports to show dependability, trustworthiness, and profitability. After careful review, if the agent in charge of the business loan application deems the business plan and business loan application as strong enough to ensure being able to repay the loan, the financial institution might be willing to take a chance on the business owner and accept their application for financial assistance (Ashta, 2019). Sometimes it takes multiple applications for a business owner to be approved. Most of the time it takes having collateral to support the loan application. P2 was fortunate enough to show growth in the business, supporting the request for more funds needed to generate more profit.

Managing Inventory

All five participants agreed that adequate inventory management is a key attribute to business success and sustainability. While some small businesses believe that it is best to have surplus inventory on display for customers to peruse and make their selection, other small business owners think that the key to inventory management is having just enough of what the customers are looking for rather than spending on surplus that may become damaged before ultimately being displayed on the shelves (Demian, 2022). P3 manages inventory more peculiarly since SB3 carries perishable items that could become damaged if displayed for a very long time. P3 indicated that the strategy used at SB3 to rotate stock is by displaying only a small amount of a particular item, while the majority is stored in a freezer or closed container in the storage room. Once a product is sold, another is brought out to replace the now-empty display space. In the remarks below, P3 indicated the strategy used in managing inventory at SB3 to ensure enough products are available and displayed at the right time. P3 stated:

On the other hand, inventory is essential. I must ensure that I satisfy the customer-service demand of providing what they want. And I have to use it all the time generously to make sure that I can get the inventory for the customers. What they need right there and not so much more. For some of them, I had to find alternatives to what they wanted and buy small quantities as a variation. And I use storage, some of them might be in the freezer, I try to control the stocking of those items. Those are the ways that I manage all those things. Then, one of the things

that I mentioned earlier is that I get myself involved in prepackaging some of

those items that last longer on the shelf.

P2 revealed that despite business owners' trepidations resulting in decreased

inventory, the more encouraging way to broaden inventory selection is by projecting

customers' needs and wants. The available funds are geared towards stocking the shelves

to ensure the store has enough of the products that customers seek to purchase. P1

continued to elaborate on the need to maximize inventory by catering to the customers'

platform rather than overstocking on products that may or may not be bought (De Moor

et al., 2022). P1 stated that it is advised to "purchase merchandise as a customer." This

strategy means shopping for products a person would buy from that person's store if that

person were a customer. The buyer will not purchase outdated or unpopular products,

however, over-purchasing the popular products provides the opportunity to have backup

products that will be retrieved from the storage room ready to be displayed (Gonzales-

Martinez et al., 2021). P1 said:

> The core of our businesses is subscription comics, ordering books, and figuring
>
> out the best balance between our ordering and appealing to the scarcity dilemma.
>
> So you know, for a comic bookstore, there's this idea that you have to have rows
>
> of comics for people to shuffle through and have on hand, but that's a lot of dead
>
> products that you're sitting on, and it's just taking real estate. So it just doesn't
>
> make sense to have that same old model of excess products. Because (a) you're
>
> losing 1000s of dollars every week; (b) it's taking up real estate, and you have to

do sales and events; and (c) in fact, that's why we have alcohol because that can

help our sales from comics.

When asked what modifications and strategies were used to improve inventory

management and how purchasing products from multiple sources rather than one

platform assisted in diversifying SB4 and its products, P4 said:

So multiple strategies, but one of them is we diversify our sources. So, when they

initially started, I was getting crafts mainly from Kenya. And diversified, instead

of getting first from Uganda, started currencies from Ghana and other parts of

Africa. I also partnered with an importer who carries things from Indonesia and

Zimbabwe. So, we had all seasons covered and got products consistently all the

time. I had inventory all the time; I upped quantities and the sources. I was so

diversified in terms of the lines of products that I carry. I diversified in the

authorities and the countries I carried from and upped up the inventory.

P5 affirmed that SB5's success was due to various products and accessories

available to match the products. P5 ensured the staff knew accessories that were best

paired with specific devices sold at SB5. Although the different carriers' services that sell

devices have specific accessories to match their unique devices, SB5 invested in finding

those universal accessories and additional devices that could be paired with any carrier,

providing a broader range of options for their customer base. P5 stated:

Well, I didn't modify much. I just kept going strong. Finding a product was the

key. The major key to keeping us afloat and keeping up with technology is

carrying the latest and greatest devices, even cheaper and lower-end devices.

Sometimes we order extra products because lack of products and parts at certain

times could disappoint a customer, and we miss some sales.

Analysis of P2's strategy for inventory management revealed areas where

customers prefer hands-on access to products. For example, for the clothes that customers

wear and the accessories to go with clothes, customers prefer to touch and feel these

products before making purchases. Gonzales-Martinez et al. (2021) stated that when

small business owners have abundant inventory on display for the customers, this

strategy could attract more customers to the business. P2 showcases a variety of materials

from a retail space that houses the inventory for the business. This symbiosis increased

SB2's visibility and versatility by creating a space for customers to have various options

for their custom-clothing designs. With the inventory in place and the cost of customer

clothing being high, P2 implemented pricing of the available products so that the high

price would not draw customers away from making a purchase. P2 stated:

> I use the five quick pennies beat one slow nickel. So instead of marking up my
>
> product too high and making a big nickel every time I sell a piece of product, I
>
> would only mark it up a little bit and make a penny. Not a penny literally, but a
>
> smaller market and sell it faster. Okay, so I would sell five times the number of
>
> custom shirts. Because I didn't overprice them and mark them up a lot. So the
>
> other five quick pennies mean that you move your product faster, you don't make
>
> as much per piece, but you move faster. And for customers, if they have more

clothes and they're wearing my clothes every day, other people see them in the

clothes and go, "Oh, that's a nice shirt." Or "I like that suit." Now you're my

advertising.

All five participants needed to increase inventory during different stages of their

businesses. Funds required to increase inventory were acquired by a private donor, a

business loan, family contributions, or the support of another full-time career. Having

abundant inventory allows the customer to be satisfied with their experience at the small

business, knowing they may find the right product they are searching for at that time

(Gonzales-Martinez et al., 2021). P1, P2, and P5 have excess space to store more

products, allowing the staff to search within the stored inventory to locate the specific

product the customer wants to purchase. P3 and P4 had enough inventory on hand to

meet the current demand. However, P3 and P4 had the resources and funds to order

additional products as soon as the need presents itself. With the flexibility of their

wholesalers, the products are available relatively quickly, thereby still meeting the

customer's demands. Having the right amount of financial support allows small business

owners to have enough inventory to support the needs of their customers (Debrulle et al.,

2020).

Advertising Management

Small business owners can use different forms of advertising to promote their

establishments (Ford et al., 2021). All five participants purchased print advertising such

as flyers, brochures, and coupons. P3 and P5 both purchased media advertising that

continuously promotes their business on television and radio stations. P1, P2, and P4

focused their advertising efforts toward social-media platforms, which is another way to

reach customers and promote their business. Word-of-mouth advertising is the most

effective form of marketing utilized by small businesses to generate visibility and

profitability for their business (Lisjak et al., 2021). Small business owners incorporate

this paradigm into promoting their businesses in local channels such as television, radio,

social media, and event participation to raise awareness, increase visibility, and attract

more customers (Kim & Chung, 2022). P3 stated, "well, employment of advertisement or

radio stations is needed. When I was doing that, I had to go on TV advertisements and

purchase paper advertisements."

Word-of-mouth advertising is a promotional dynamic whereby customers

communicate with others about a personal experience with the small business (Sashi &

Brynildsen, 2022). It could be through print, media, or in-person communication. P5

elaborated on the power of word-of-mouth promotion to increase visibility and

profitability for SB5 by stating the following words:

Word of mouth is a big one for us. We were only advertising in the Yellow Pages.

Can you believe it? I had a business-card size ad in the Yellow Pages. And that's

all I relied on for people to call us. Answering that phone is critical. Sure, people

click on your listings from all over the country, especially in your advertising

area. Answering your phone is crucial in this industry because they're looking for

something special. They're looking for a certain product, and they're looking for a

particular repair. And many stores don't answer their phones. Yeah, I don't know why, but we do.

P5 expressed that small business success is due to the business' visibility and ways the business owner spreads the word and answers questions about the business. It is important to be always open, available, and informative when a customer has a question or a need or wants to find the direction to the retail store (Lauri, 2021). P5 continued by stating the following words,

Keeping up with tech also means keeping up with social-media advertising and Google ads. Yeah, you know, you want to have that social-media presence, but you don't want to spend too much money on it. But if you want to, you cannot avoid having that presence. Google ads are a recurring thing as well like Facebook is a recurring thing, as well as Yelp. So those are the major three that are important. But if somebody is looking for you, Yelp is very big. When you're Googling something that comes up, it's one of the top five, top three, or top 10 searches for our business. So you want to have at least that presence on there.

Customers who purchase from a small business expect excellent service and great-quality products (Kim & Chung, 2022). Once customers are satisfied with these two business components, they are bound to share their experience with a friend, a family member, a coworker, and sometimes even a stranger in the streets. P2 embraces the opportunity to provide outstanding service to customers knowing that when these

customers leave SB2, they will most likely share their experience with someone else that will come to visit and shop at the business. P2 explained:

> And then they say, 'Oh yeah, this is a great, you know, a great place to go buy it. They didn't overcharge me. I thought it was a good price or more expensive than I wanted, but it wasn't as bad as others,' or whatever. And then the other strategy, I think, is what we just talked about, the lean-and-mean strategy. Just don't spend money unless you're going to make an actual return on it. That's important. Too many people advertise, especially back in the day, you know, advertising every place they can find without thinking about the return.

P4 emphasized the importance of joining local networking groups that could talk about the business and promote the small business to other businesses, customers, and clients. With the payment of a small annual fee, a business owner could invest in a networking organization that takes pride in sharing and promoting other businesses to the community. It helps when other people are talking about the business rather than the owner being the only source of information about the participating small businesses. P4 suggested, "initially, [the purpose] is to join the chambers of commerce, like associations where they support other businesses because then you have multiple people talking about your business except you."

Correlation to the Literature

Theme 2 correlates with Formentini et al.'s (2019) reference to startups, indicating that when starting a new business, having adequate capital is important for

owners to manage and operate their startups during the first 5 critical years in operation.

With an abundance of funds, the small business owners can allocate money toward

obtaining the proper inventory to stock the retail-store shelves and promote their

businesses within the target area (Formentini et al., 2019). For this reason, small business

owners must obtain capital from sources willing to take the risk in hopes of earning

profitability from the increase in sales derived from the increase in inventory and

advertisement to potential customers (Moore et al., 2018). Therefore, small business

owners should aggressively seek enough capital to financially support the logistical

increase of their inventory and increase the broad reach of their advertising (Debrulle et

al., 2020).

Correlation to the Conceptual Framework

Theme 2 aligns with Schumpeter's (1934) entrepreneurship theory in that the

availability of financial resources generated logistical inventory and an increase in

advertising resources, which is a significant contributor to the success of a small business

during the startup stages. Small business owners with resources to obtain financial

support create innovative strategies that enabled them to disburse the funds to the crucial

areas of their businesses that need a boost, restructure, or have just more resources to

cover the growth. Schumpeter suggested that business growth requires strategic planning

that would lead towards obtaining funds, managing inventory, and using effective

advertising strategies. Business growth of entrepreneurs evolves from meticulous

strategic planning, leading to more customer presence and involvement, which

subsequently grows and sustains the business (Formentini et al., 2019). This strategy can be used by small business owners to gain an opportunity to gauge their resources and the available avenues to determine the best ways to establish and operate their businesses (Schumpeter, 1934). Small business success and survivability depend on adequate visibility formulated from sufficient advertising and enough inventory.

Applications to Professional Practice

Small businesses could use the results of this study to explore the strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations. The primary purpose of this qualitative multiple case study was to explore the strategies that owners of small traditional retail stores used to survive beyond the first 5 years of operations. The goal was to provide effective measures small business owners could implement, thereby stimulating business growth and avoiding challenges that destabilize other small businesses with less than 5 years from startup.

Small business owners can use this strategy to provide visibility for their retail stores, manage funds, coordinate inventory, and advertise effectively. Once business owners begins to strategize on visibility options, they may decide to implement some of the innovative strategies presented in this study, such as hosting events at their local retail stores, attending community events in their local community, and involving customers with surveys. Small business owners that invest in strategies to increase the visibility of their businesses strive toward success for their business (Lauri, 2021). High visibility in the community comes from recurring events hosted at the local retail stores and routine

participation at diverse community events in the target area. Small business owners should implement these strategies to increase visibility for their local retail stores, thereby increasing sales and survivability.

Community involvement, such as vendor events, state fairs, festivals, and more community gatherings are some of the many events in which small business owners could participate to increase visibility in their community and attract the interest of local shoppers. When managing and improving innovative strategies for success and sustainability, community awareness should be a key goal for business owners (Sinha & Fueky, 2021). P4 stated that the continuous support and patronage of the local shoppers that discovered the small business at a community event led to increased sales, generating substantial profit sufficient to cover expenses and having excess to reinvest into the business. Business owners can obtain funds from banks, crowdfunding, family gifts, self-funding, and profit from already profitable businesses (Ashta, 2019).

All five participants stated that investing funds towards inventory that attracts customers' attention is another crucial strategy for small business owners to implement, grow, and sustain their businesses. Starting a business from nothing is a challenging endeavor that requires innovative thinking, strategic planning, and dedicated management to survive and sustain beyond those critical first 5 years of operation (Herger, 2021). The small business owners that began this process and those looking to begin a new business could benefit from the strategies comprised in this study. The proper management of funds generates a path for visibility, adequate inventory, and appropriate advertisement

(Jakhar & Krishna, 2020). Risk management, adequate training and education, strategic planning, organizational culture, branding, profit, loss management, and many more business strategies are all small parts of the extensive process of opening, managing, and growing a traditional retail small business beyond the critical first 5 years of operation (Herger, 2021). All small business owners should invest in equipping themselves and their organizations with the tools, skills, and knowledge to successfully survive and sustain their businesses.

While conducting research for this study, I understood that the primary driver of a successful small business is passion. Business growth comes from the passion of the business owner, employees assisting the owner, and customers eager to purchase the products on display at the business. Retail business is very competitive, especially in the popular industry (Gonzales-Martinez et al., 2021). Therefore, small business owners would have to build relationships with their customers to gain their trust and loyalty.

Small business owners with unique items not easily found would have to be innovative in attracting and retaining customers' attention and loyalty. The challenge of providing the same products from two stores away can be overwhelming at times. However, this study's participants invested in advertising and high visibility of everyday products through their relationships with customers. The participants with unique products dedicated their advertisements to introducing customers to their unique items and generating connections with those showing interest. Once small business owners

apply these practices derived from this study, they may acquire enough knowledge and skills to grow and sustain their business beyond the critical first 5 years of operation.

Implications for Social Change

Small businesses can be social change agents through transformational leadership of employees, organizations, and their communities. Social change is the transformation of mindsets, interactions, and engagements among social actors in a society (Oluwatobi et al., 2020). The intent of this study was to identify strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations. Social change from this study can benefit small businesses in multiple areas, such as increases in advertising opportunities, economic growth, community funding opportunities, and community visibility through events and festivals. Entrepreneurs, by extension, are then able to contribute to the growth and success of the U.S. economy (U.S. Bureau of Labor Statistics, 2016). For example, small businesses in Missouri accounted for 46% of new jobs in 2017 (U.S. Small Business Administration, 2020a). Owners of small traditional retail store could use the strategies that emerged from this study to survive beyond the first 5 years of operation, resulting in the creation of new jobs and the increase of the local tax base. Local governments could use the increase in the local tax base to make improvements in their communities, such as the creation of recreational parks.

According to Motoyama (2019), about 50% of all small businesses survive beyond 5 years from startup. Therefore, this study's findings can be used to improve social change and increase the survivability of small traditional retail businesses. The

positive social change implemented by the strategies proposed in this study can potentially increase social change for the business, its employees, and the community. Negative social change could impact a small traditional retail business through decreased employment, lack of government support for economic growth, and obscene tax-based increases. The strategies discussed in this study can be implemented to improve visibility within the community, obtain funds from the appropriate channels, and advertise at more lucrative mediums. This strategy can enhance social change for small traditional retail businesses on a path to survival beyond the first 5 years of operation.

Recommendations for Action

Recommendations for action for small businesses obtained from the two emerging themes discussed in this study emerged from semistructured interviews and the organizations' documents. Firstly, I explored strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations. After extensive data collection and analysis, I recommend the discussed strategies to owners of startups, franchises, or established small businesses that are researching strategies for survival and sustainability beyond the critical first 5 years of operation. In this study, I found that for a small business to survive and sustain itself, the owner should continuously implement innovative strategies to increase visibility, obtain funds for its operations, and improve advertisement capabilities.

The steps for action include involvement in community events and festivals by hosting events at the local retail store and conducting customer surveys. As business

owners attend and participate in these community events, they increase the visibility of their products and services. In addition, this gesture generates awareness to the community and other small businesses.

The second recommended step for action is obtaining funds. Financial stability is an added benefit for businesses and leads to successful managing and operating the businesses (Jakhar & Krishna, 2020). The availability of increased funds can potentially provide the small business owner with resources to manage the business operation more feasibly. Self-financing is important and sometimes more easily accessed for prominent small business owners (Gonzales-Martinez et al., 2021). With abundant funds, the small business owner may have the opportunity to stock retail space with enough inventory to handle supply and demand. When small business owners apply for funds, the financial institution reviews the application before determining if they are willing to take a chance on the business owner and accept their application for financial assistance (Ashta, 2019). Because of the availability of funds, the small business owner could also advertise aggressively and continuously draw shoppers' attention. Lastly, I recommend that small business owners network with like-minded business owners to help learn and share ideas that would help mitigate the dilemma faced by inexperienced or untrained small business owners.

All participants expressed thoughts on these three strategies and the implementation of each in their businesses for a successful and sustainable small traditional retail store to survive beyond the first 5 years of operations. The individuals

who ought to practice these strategies rigorously are those opening a small traditional retail store for the first time. Therefore, small business owners with existing retail stores within the first 5-year mark could benefit from the strategies provided in this study. In addition, this study may be beneficial to organizations training small business leaders and owners as well as first-time business owners and leaders. Another group of individuals that could benefit from this study is students researching strategies to survive or sustain a small traditional retail store.

This study could be of benefit to anyone seeking strategies to grow any business or organization. If the business owners dedicate themselves to increasing the visibility of their establishment through community involvement, obtaining funds to manage resources, securing enough inventory or service capabilities, and advertising their business, customers and sales may increase. I will disseminate a summary of the results of this study to the local chamber of commerce in my community as well as to students and members of organizations that assist small businesses with strategies to survive and sustain their businesses. I will also have the study published in business journals. By presenting the findings of this study, I will be disseminating resources that current small traditional retail business owners have implemented to survive and sustain their businesses beyond the critical first 5 years of operation.

Recommendations for Further Research

I chose a qualitative multiple case study to explore the strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations. The results

of this study could be imperative to small businesses in identifying effective strategies to

implement in their businesses, ensuring survival and sustainability. The strategy used by

the five participants I interviewed aligned with the literature review and the conceptual

framework discussed in this study. However, further questions are needed to elaborate

more on the findings of this study. Although this study focused on small businesses, the

question that surfaced throughout the research implied how these strategies could be

applied to larger retail businesses with over 500 employees.

Another question that emerged during the research for this study is the

implementation of these strategies for nonretail organizations. With further research,

larger and nonretail businesses could implement the same business strategies proposed in

this study. Larger businesses could implement the strategies that emerged from this study

by expanding the scope of community involvement, obtaining a larger amount of funds,

displaying larger inventory, and engaging in prominent advertising. Nonretail businesses

could be more involved in the community through the type of events they participate in

or host, obtaining funds from the proper channels, and advertising in the appropriate

target market.

I identified two limitations in this study. Limitations are the unaccounted

weaknesses observed by the researcher, which could hinder the data collection process

for a study ((Theofanidis & Fountouki, 2019). A limitation of this study is that only five

small business owners participated. Conducting a study at a limited number of

organizations prevents the application of findings across the retail store industry.

Additionally, some participants chose not to participate in the study or refused to share documentation, furthermore, leading to seeking different participants, which delayed the research timeline. However, the small business owners could provide the collected data to small businesses seeking to explore strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations. The results of this study could be imperative for small businesses to identify effective strategies to implement in their businesses to ensure survival and sustainability.

Reflections

The Doctor of Business Administration program at Walden University was one of the most challenging events of my life; however, this experience was the most rewarding academic achievement. Through this study, I was enlightened about the critical impact of small business involvement in the community, state, nation, and global economy. In addition, I have learned the effects of small, meticulous steps and strategies that are fruitful with consistent and diligent process. Such careful endeavors could lead to rewarding successful business growth for the small businesses. This doctoral journey required vital mental agility, extreme self-discipline, multiple sacrifices, and patience.

The rigorous writing requirement has helped me become a better writer. The critical thinking skills needed to collect and analyze data assisted in developing my critical thinking skills. The time management required to meet deadlines disciplined me enough to sit, write, and edit for countless hours, which helped me become more focused and dedicated to one task at a time. The sacrifices I made during my study have been

significant; however, they will be worth having experienced them after completing my study.

I added additional stress to myself by moving multiple times, changing jobs numerous times, and changing a relationship, which were the three main life changes that I was instructed not to make during a doctoral journey. However, I accomplished the goal of completing this doctoral program. I appreciate my family, friends, and mentors, as they patiently listened to my complaints or endured my canceled plans. I admire all doctoral candidates and those that completed this journey; it is not for the faint at heart. I respect my professors and academic advisors for their diligent work and assistance. But most importantly, I am grateful to the small business owners who allowed me to learn from their mistakes to be able to grow.

Conclusion

In this qualitative multiple case study, I explored the strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations. The target population consisted of five owners of small traditional retail stores in the State of Missouri with successful experience in using strategies to survive beyond the first 5 years of operations. The implications for positive social change include the potential to reduce the failure rate of small traditional retail stores, which might lead to more tax revenues for the communities, resulting in the provision of social amenities and the creation of more jobs for the residents.

I chose entrepreneurship theory because it served as an appropriate conceptual framework for my case study, as owners of small traditional retail stores can use the principles and attributes of the entrepreneurship theory to survive beyond the first 5 years of operation. According to Schumpeter (1934), the role of the entrepreneur as an innovator consists of five characteristics, which are the (a) introduction of new goods or quality of goods, (b) introduction of a new production method, (c) establishment of a new market, (d) use of new sources of raw material suppliers, and (e) formation of a new organization in the industry. I selected entrepreneurship theory as a foundation to understand strategies owners of small traditional retail stores used to survive beyond the first 5 years of operations.

I conducted Zoom one-on-one interviews with five small business owners, each with over 5 years of successful retail business operation. I also collected supporting documents, such as balance sheets, annual returns, and annual reports. The following two themes emerged from data analysis: community involvement improved business visibility and availability of financial resources generated logistical inventory and increased advertisement resources. Theme 1 incorporated three subthemes: community events, hosting events, and customer surveys. Theme 2 incorporated two subthemes, which were obtaining funds for operation and managing inventory. As a result of this research study, traditional small retail businesses implementing these strategies may survive beyond the first 5 years of operations.

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Appendix A: Interview Protocol

The purpose of this qualitative multiple case study is to explore the strategies owners of small traditional retail stores use to survive beyond the first 5 years of operations.

Interviewee: _____ Location: _____

Date: _____ Time: _____

Notes:

1. Greet interviewee and introduce yourself.

2. Provide overview of the study and indicate the potential usefulness of the outcome.

3. Remind interviewee about their volunteer efforts to participate in the study.

4. Remind interviewee about recording the interview and start the recording.

5. Start the interview by recording interviewee's pre-assigned coded name, date, time and location.

6. Start asking interview questions. Allow enough time to answer those questions.

7. Listen carefully to interviewee. Ask probing and follow-up questions, if needed.

8. At the end of the interview, thank interviewee for their participation and time.

9. Provide participant your contact information if they have any questions.

Appendix B: Interview Questions

1. What strategies did you use in your organization to successfully survive beyond the first 5 years of operations?

2. How were strategies to survive beyond the first 5 years of operations communicated throughout the organizational ranks and among stakeholders?

3. How did your employees respond to those strategies?

4. What modifications did you apply to any strategy to improve its effectiveness in helping your organization survive beyond the first 5 years of operations?

5. What derivative policies and processes have you used to successfully survive beyond the first 5 years of operations in your organization?

6. What were the key barriers to implementing successful strategies to help your organization survive beyond the first 5 years of operations?

7. How did you overcome the key barriers to implementing strategies to help your organization survive beyond the first 5 years of operations?

8. What else would you like to add about successful strategies used in your organization to survive beyond the first 5 years of operations?