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## **Strategies U.S. Small Retail Business Leaders Use to Retain Customers**

Wanda Ann Fisher -Robinson  
*Walden University*

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# Walden University

College of Management and Human Potential

This is to certify that the doctoral study by

Wanda A. Fisher Robinson

has been found to be complete and satisfactory in all respects,  
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the review committee have been made.

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Walden University  
2024

Abstract

Strategies U.S. Small Retail Business Leaders Use to Retain Customers

by

Wanda A. Fisher Robinson

MA, Webster University, 2019

MS, Trinity DC College, 2003

BS, University of the District of Columbia, 1999

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

March 2024

## Abstract

Maximizing customer retention is paramount for U.S. small retail businesses' success in the marketplace. Leaders of U.S. small retail businesses are concerned about customer retention because the loss of customers can negatively impact profitability, viability, and competitiveness. Grounded in general systems theory, the purpose of this qualitative pragmatic inquiry was to identify and explore successful strategies that some U.S.-based small retail business leaders use to retain customers. The participants were 10 small retail business leaders in Washington, D.C., Maryland, and Virginia region who successfully implemented strategies to retain customers. Data were collected using semistructured interviews and public documents. Through thematic analysis, four themes were identified: (a) providing good customer service, (b) ensuring customers received high-quality products or services, (c) using social media to interact with customers and for marketing, and (d) ensuring corporate social responsibility. A key recommendation is for small retail business leaders to train employees on industry trends, improving product knowledge and customer service skills. The implications for positive social change include the potential to increase customer retention and enhance a small business' viability and employment opportunities, which can have a positive impact on local communities and tax revenues.

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## Dedication

I dedicate my doctoral studies to my parents, Ronald, and Gloria Fisher, who have significantly shaped who I am today: To my husband, who was patient during this journey showing me grace and, mercy: my grandparents, daughters, grandchildren, aunts, uncles, sisters, brothers, nieces, nephews and godmother cousins, and my extended family who walked beside me on this journey. To Pastor John K. Jenkins and the First Baptist Church of Glenarden, whose worship services helped me remain faithful and focused. My determination and commitment to finishing anything I start was all because of your love and support. I will never forget you for being the reason I am who I am.

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Although the journey was long, my parents never doubted that I could succeed, and I am grateful for not knowing the word I can't do it because they told me I could, and I did. I shall persist in portraying my family and community in a positive light and inspiring and motivating the next generation to bring about positive change

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## Section 1: Foundation of the Study

The COVID-19 pandemic forced many nonessential businesses to suspend operations, significantly influencing small businesses, particularly in customer retention. The COVID-19 pandemic created challenges that have necessitated the development of novel strategies for retaining customers (Baker & Judge, 2020). Small retail businesses are crucial to the economic vitality of the United States, contributing significantly to gross domestic product and private-sector employment (Alsaaty & Makhoul, 2020). Successful customer retention strategies are essential for small business leaders to maintain customer loyalty and financial sustainability (Ferdiawan et al., 2018). Failure to employ successful customer retention strategies could lead to business failure (Dastane & Fook, 2021). To address customer retention issues, I identified successful customer retention strategies that small retail business leaders use to sustain their operations. The findings of the research study could assist current and future small retail business leaders in enhancing their customer retention strategies and attracting new consumers, leading to greater success.

### **Background of the Problem**

The COVID-19 pandemic brought unforeseen challenges to small business leaders, especially regarding customer retention. The pandemic forced 3.3 million active business leaders to close their businesses, with 22% directly attributed to the pandemic (Fairlie, 2020; U.S. Census Bureau, 2019). Small business leaders have witnessed the negative impact of customer attrition on larger competitors who offer products and services that cater to customer brand loyalty, which are sometimes not available to

customers of smaller businesses (Alsaaty & Makhoulf, 2020). Customer attrition to large companies with additional human and financial resources could reduce smaller competitors' profitability and customer retention. However, as Belitski et al. (2022) suggested, innovative and technologically advanced strategies could help small business leaders improve customer retention and attract new customers. By implementing such strategies, small business leaders could enhance customer retention and appeal to current and prospective customers, leading to greater success.

An empirical inquiry is necessary to understand small business leaders' effectiveness of innovative customer retention strategies. Expanding knowledge regarding how small business leaders develop and adapt strategies in response to a rapidly changing economic landscape has academic and practical implications for both scholarship and small business leaders (Kalani et al., 2018). Adopting optimal customer retention strategies could increase profitability and industry competitiveness for small business leaders. Small retail business leaders who seek to enhance and improve customer retention should implement various strategies to retain their customers (García-Fernández et al., 2018). Therefore, an empirical inquiry to identify optimal customer retention strategies for small businesses is crucial, necessary, and timely. Small business leaders could increase their profitability and competitiveness by focusing on customer retention.

### **Problem and Purpose**

The specific business problem was that some U.S. small retail business leaders lack customer retention strategies to retain customers. Therefore, the purpose of this

generic qualitative pragmatic inquiry was to identify and explore successful strategies that some U.S. small retail business leaders use to retain customers.

### **Population and Sampling**

Data were gathered from 10 purposefully sampled small retail business leaders in the United States who were interviewed using a semistructured interview method to obtain their personal experiences dealing with strategies employed to retain customers. In addition to the semistructured interviews, I reviewed public data for pertinent information.

### **Nature of the Study**

A qualitative method was appropriate for exploring successful strategies some U.S. small retail business leaders use to retain customers. The qualitative method involves exploring the experiences and behaviors of individuals in the context of their natural setting and what has occurred in their lives (Allemang et al., 2022). Quantitative and mixed methods approaches involve statistical methods to understand relationships between numerical variables (Amaratunga et al., 2002). Quantitative and mixed methodologies were unsuitable for this study because I was not examining quantifiable, numerical variables regarding customer retention. Qualitative research methods are best suited for exploring the experiences and behaviors of individuals (Yin, 2018). In this context, I examined the experiences and behaviors of small retail business leaders regarding customer retention strategies.

I chose a pragmatic inquiry research design for this study. The pragmatic inquiry involves studying data sources to identify patterns and themes, which would provide a

more reliable and substantial understanding of the phenomenon under investigation (Schoch, 2020). A pragmatic inquiry design also provides in-depth data investigation, descriptive themes, and rich data encompassing numerous cultural influences that cannot be discovered using a case study or other research design (Schoch, 2020). A pragmatic inquiry design was appropriate for this study as it enabled the exploration and understanding of successful customer retention strategies utilized by multiple small retail business leaders. Other qualitative research designs, including phenomenological, ethnography, grounded theory, and single case study were considered for this study but were deemed inappropriate due to lack of alignment with the study's purpose (see Creswell et al., 2007). The qualitative pragmatic inquiry research design was most aligned with the purpose of this study. This approach allowed me to understand the phenomenon comprehensively and identify patterns and commonalities among the small retail business leaders studied. Therefore, a qualitative research methodology with a pragmatic inquiry research design was the most suitable qualitative research design for identifying successful customer retention strategies used by small retail business leaders.

### **Research Question**

The research question guiding this study was: "What strategies do some U.S. small retail business leaders use to retain customers"?

### **Interview Questions**

The following interview questions were devised to understand what strategies some U.S. small retail business leaders use to maximize customer retention:

1. What strategies do you use to retain customers?



2. How, if at all, have you used social media strategies to retain customers?
3. How do you leverage technology advancements to personalize and enhance the customer experience, and how does it impact customer retention?
4. What strategies or initiatives have you implemented in your small retail business to train your employees in customer retention techniques?
5. What systems or processes do you use to enhance customer retention?
6. What marketing strategies do you use to improve customer retention?
7. How important is corporate social responsibility to your small retail business, and how does it contribute to customer retention?
8. In what ways does the quality of your firm's products and services impact customer retention?
9. How, if at all, do you gather feedback from your customers to assess their satisfaction and identify areas for improvement in your customer retention strategies?
10. What else can you tell me about strategies to retain customers that I did not ask?

### **Conceptual Framework**

von Bertalanffy's (1968) general system theory (GST) was the concept that grounded this research study and emphasized the need for a universal system theory applicable to all systems. GST can be used to investigate various interrelated aspects that influence small retail business leaders' processes, including financial operations, internal and external stakeholder interactions, and social and environmental variables that support

strategies for customer retention (Cambra-Fierro et al., 2014). Researchers often use systems theory to discover a method for predicting the outcome of decision-making actions (Tadeja & Clarke, 2018). Using systems theory helped me understand how small retail business leaders make informed decisions regarding strategies to retain customers (Tadeja & Clarke, 2018). GST allows for considering interconnected issues, such as customer and business trust, offering a holistic approach to understanding customer retention (Cambra-Fierro et al., 2014). As a guiding concept for the research study, GST enabled a comprehensive understanding of the factors influencing small retail business leaders' decisions regarding customer retention strategies (Cambra-Fierro et al., 2014). The holistic approach inherent in GST aligns with my goal of identifying successful customer retention strategies considering various interconnected components (Bhat & Darzi, 2018). The use of systems theory provided insight into how small retail business leaders could make informed decisions regarding customer retention strategies.

When devising strategies to produce successful outcomes for the entire system or small retail business, analysis using GST as a framework was vital for understanding small retail businesses' customer retention within the context of the entire small retail business rather than a single department. The GST framework supported the purpose and problem of my study to discover and examine the effective customer retention techniques employed by small retail business leaders (Bhat & Darzi, 2018). The GST framework was connected logically to my research as it addressed the primary business challenge of retaining customers by small retail businesses, which could have a competitive advantage by satisfying their customers over time (see Bhat & Darzi, 2018). Bertalanffy's GST

helped me identify and enhance my understanding of the successful strategies for analyzing, improving, and managing business performance using a holistic approach to customer retention and targeting potential customers.

### **Operational Definitions**

The operational definitions section includes explanations of terms used concerning customer retention.

*Customer behavior:* Customer behavior refers to the actions, decisions, and emotions exhibited by individuals when engaging with a company's products or services and is influenced by a wide range of factors, including social norms, personal values, and cognitive biases (Jafarkarimi et al., 2016).

*Customer expectations:* Customer expectations refer to the set of assumptions and desires that individuals have when interacting with a business, encompassing both tangible and intangible factors such as product quality, service, and brand reputation. These expectations are shaped by past experiences, cultural influences, and personal preferences, and play a critical role in determining customer satisfaction and loyalty (Vrontis et al., 2019).

*Customer loyalty:* Customer loyalty is the customer's intent to do repeat business with a company (Kandampully et al., 2015).

*Customer perceived value:* Customer perceived value is a component assessment of consumers' perception of the exchange of time, money, or energy compared to the item or services received (Hapsari et al., 2016). Customer loyalty is the anticipated benefit from a consumer's product or service perspective.

*Customer relationship management:* Customer relationship management creates and maintains profitable customer relationships by delivering superior customer value and satisfaction to improve customer relationships (Soltani & Navimipour, 2016).

*Customer satisfaction:* Customer satisfaction pertains to customers' perceptions of perceived and expected performance (Ali & Anwar, 2021).

*Reliability:* Reliability is the ability to deliver the promised service dependably and consistently (Jagadeesan & Chinnadurai, 2015). Customers in health and fitness clubs expect clubs to provide services in a safe and active environment (Jagadeesan & Chinnadurai, 2015).

*Responsiveness:* Responsiveness refers to a business' willingness to help customers and to provide prompt services (Jagadeesan & Chinnadurai, 2015). Responsiveness concerns the fitness clubs' delivery styles and relationships with customers. Fitness clubs are more likely to lag in responsiveness, as their primary goal is to provide attractive physical environments (Jagadeesan & Chinnadurai, 2015).

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

The assumptions, limitations, and delimitations section of a research study is an essential component that outlines the researcher's perspective on the scope and boundaries of the study. By explicitly stating the assumptions made, limitations faced, and delimitations set in the study, readers can better understand the context and validity of the research findings and identify potential areas for future investigation.

## **Assumptions**

Assumptions are crucial in shaping a researcher's decision-making process, influencing the development of theories, research instruments, and the overall planning and execution of a study. Assumptions are the underlying philosophical views and perspectives that shape a researcher's decision-making (Ross & Bibler Zaidi, 2019). Assumptions could form the basis for developing theories and research instruments, which could influence the planning and execution of the research process (Ross & Bibler Zaidi, 2019). Although unverifiable, assumptions are perceived as true (Marshall & Rossman, 2014). Two assumptions guided the pragmatic inquiry. The first assumption was that the interview questions were appropriate for the study. The second assumption was that the participants' responses would provide insight/information necessary to address the central research question. Acknowledging the two assumptions was essential because assumptions could shape the analysis of the research problem (see Marshall & Rossman, 2014). Considering the two assumptions, the study's findings could help understand why some small retail business leaders' previous customer retention methods were ineffective and required improvement. Assumptions are crucial in shaping a researcher's decision-making process, influencing the development of theories, research instruments, and the overall planning and execution of a study. Assumptions are the underlying philosophical views and perspectives that shape a researcher's decision-making (Ross & Bibler Zaidi, 2019). Assumptions could form the basis for developing theories and research instruments, which could influence the planning and execution of the research process (Ross & Bibler Zaidi, 2019). Although unverifiable, assumptions are

perceived as true (Marshall & Rossman, 2014). Considering the two assumptions, the study could help me understand why some small retail business leaders' previous customer retention methods were ineffective and required improvement.

### **Limitations**

Due to the rapidly evolving nature of technology and the retail industry, it is essential to acknowledge that the findings of this research study may have limitations in terms of their transferability beyond the scope of the study. A limitation is a restriction or constraint that prevents a study from being complete or perfect (Walton, 2018). This qualitative pragmatic inquiry focused on 10 small retail business leaders in the DMV regions, but some limitations must be considered. One limitation was that the study had a small number of participants, which may not represent the entire population of small retail business leaders in the region. The limited pool of participants chosen could affect the research findings, as the pool size could not be large enough to be transferrable to other industries (Ross & Bibler Zaidi, 2019). Another limitation was that the data collection process relied on self-reported data from the participants, which might not be completely accurate and may not fully reflect their actual behavior or strategies implemented. A researcher is responsible for presenting complete and honest limitations of a proposed study to the academic community (Ross & Bibler Zaidi, 2019). A limitation is outside the researcher's control and should be addressed appropriately. A limitation could have an impact on the study's design, results, and conclusions. (Theofanidis & Fountouki, 2018).

## **Delimitations**

In research, delimitations refer to the boundaries established by the researcher. By specifying the study's scope, limitations, and boundaries, researchers enable readers to understand which aspects of the topic are being studied or excluded (Cohen et al., 2020). Delimitations are vital as they assist readers in interpreting results and assessing external validity while preventing the study from becoming too broad, which could hinder the analysis or interpretation of the findings (Cohen et al., 2020). This case study had two delimitations. The study only focused on small retail business leaders in the DMV region, excluding other U.S. regions. A geographic delimitation could affect the transferability of the study's findings to small retail business leaders in other regions. Second, I only considered small retail business leaders and excluded leaders of medium or large businesses. The study's population size could be scrutinized, necessitating careful consideration to collect only relevant data. Excluding variables beyond the project's scope ensures accurate and focused findings (Hopkins & Hummell, 2021). and is essential to establish delimitations relevant to the research question, ensuring that the study's results are valid, reliable, and useful to the academic community.

## **Significance of the Study**

This qualitative study identified and explored the strategies used by U.S. small retail business leaders to retain customers. The significance of the research study lies in the importance of customer retention in the survival of small retail businesses in the United States; with the rise of e-commerce and competition from large retail chains, small business leaders need to develop compelling customer retention strategies to

remain competitive. By exploring the strategies used by small retail business leaders to retain customers, I aimed to provide insights that could help improve customer retention rates and increase profitability for small businesses. As small businesses are a significant driver of the U.S. economy, with over 30 million small businesses employing nearly half of the private sector workforce, the study's findings could have far-reaching implications (Staff, 2023). The study's findings could inform policymakers and business development organizations to design and implement effective support programs and policies to assist small businesses in improving customer retention rates.

### **Contribution to Business Practice**

The study's findings could contribute to business practice by providing small retail business leaders with insight into effective customer retention strategies. Retail businesses face extensive competition in today's market, and customer retention is crucial to sustaining growth and profitability. Some small retail businesses struggle to retain customers due to limited resources, which could result in an overreliance on acquiring new customers. The study's results could offer practical recommendations for small retail business leaders to retain customers and potentially increase revenue. By understanding the factors influencing customer retention, small retail business leaders could tailor their strategies to improve customer loyalty and increase the likelihood of repeat business. The study's contribution to business practice could help small retail business leaders in the selected regions overcome challenges in retaining customers, thereby promoting growth and profitability.



## **Implications for Social Change**

Through this qualitative study, I aimed to identify strategies employed by some small U.S. retail businesses to retain customers. Small retail businesses play a vital role in the growth and prosperity of the U.S. economy by generating local and federal tax revenue (Schoenung & Dikova, 2016) and creating employment opportunities for local communities (Flora & Johnson, 2019). Leaders who implement successful strategies for retaining customers could further contribute to the growth of small retail businesses, leading to more job opportunities and increased tax revenue for connected communities (McCann & Barlow, 2015). The study could contribute to positive social change by providing small retail business leaders insights about effective customer retention strategies, enhancing their ability to influence economic growth and create a sustainable future for their communities.

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

The purpose of this qualitative pragmatic inquiry was to identify and explore successful strategies that some U.S. small retail business leaders use to retain customers. Extensive research on customer retention may help researchers understand strategies small retail business owners use to retain customers and support their businesses. Information exists on customer retention (Morgeson et al., 2020). However, scholars have reported a dearth of literature on customer retention strategies used by small retail business leaders (Hawkins & Hoon, 2019). The focus of this study was to address this gap in the literature by exploring customer retention strategies used by small retail business leaders.

The literature review begins with a description of the study's conceptual framework, GST, along with a contrasting theory, the expectation-confirmation theory. The literature review is then organized into seven themes: (a) customer satisfaction, (b) customer loyalty, (c) customer relationship management, (d) customer engagement, (e) customer engagement, (f) a strategic plan for customer retention, (g) marketing strategies, and (h) disruptions to customer retention.

A professional and academic literature search was conducted using the following keywords: *general system theory*, *customer retention*, *small business*, *retail*, *customer satisfaction*, and *customer loyalty*. Several databases were searched, including Google Scholar, EBSCO, Emerald Insight, ACM Digital Library, Science Direct, and ProQuest Central. Several journals emerged as key sources of information, including SSRN, The Journal of Retailing, and the Journal of Consumer Marketing. The literature review contained 246 sources, the nature of which are summarized in Table 1.

**Table 1**

*Sources Used in This Study*

Publication Type	Literature Review	Percentage
Total number of references	245	
Number of references used that are 5 or less years old	215	87%
Number of references that are peer-reviewed	209	86%

**General System Theory**

GST is the theoretical foundation of this study. GST was introduced by von Bertalanffy (1968) and is a theory that emphasizes interrelationships rather than individual components. According to GST, a system is self-regulating and self-correcting

(Spain, 2022; von Bertalanffy, 1968). GST contains three concepts: (a) system units, (b) continuous interconnectivity, and (c) analyzing systems provides an understanding of interconnected systems (von Bertalanffy, 1968). System units are the foundation of systems science, which explores systems across various fields. The second aspect of GST, continuous interconnectivity, is foundational to systems technology, which refers to challenges that may arise in society and technology due to connections between systems. The third concept, involving an analysis of the systems, comprises systems philosophy, which pertains to how theorists think about and conceptualize systems (von Bertalanffy, 1972). Together, these three concepts form the basis of GST.

GST and its components have been widely applied to research, especially in business and marketing. von Bertalanffy (1972) elaborated on the theory of systems and how those theories could be applied to research across various fields. People and interconnected processes can be understood effectively within broad context of their environments (Christianson & Barton, 2021), such as when GST principles are applied. Customer retention strategies can be better understood using the GST approach (Zhang et al., 2022). Leaders of small retail businesses can benefit from referencing GST theory to develop effective strategies for promoting customer retention by addressing their business and customer interactions as an integrated system. As a result of that description, GST concepts can be applied to a study on customer retention, even though GST was not originally applied in this context. I applied this theory to analyze how small retail business leaders develop and implement customer retention strategies to mitigate customer attrition within the context of the entire small retail business system.

## **GST Components**

Small business retailers' personnel and customer networks should be reviewed and analyzed to determine factors that may contribute to customer attrition. Typical businesses process information about customers and produce products and services based on the fundamental principles of GST (Jackson, 2019). Information gathered and output products and services create the boundaries defined by the system (Bednar & Welch, 2020). von Bertalanffy (1972) acknowledged that business leaders should interact with agents and stakeholders in their external environments, noting that a systems approach can support businesses in accomplishing their goals and objectives. There are two general types of systems. Open systems are influenced by their environment, accepting input or information from the environment, and releasing outputs into the environment (Roth, 2019). Closed systems are systems in which interaction occurs only between system components and not with the environment (Jackson, 2019). Small retail businesses can be viewed as open systems in which the small retail business and customers interact with each other, and release information and products into the environment, potentially attracting new customers.

A system referenced in GST is precise and multifaceted. In GST, a system is a collection of parts that interact and depend on one another to form a comprehensive whole, which is often more than the sum of its parts (von Bertalanffy, 1972). A system's environmental boundary identifies and separates the system from other systems within the same environment. The extent that a system can grow, learn, and adapt depends on the extent of engagement with the environment and other factors influencing their

organization (von Bertalanffy, 1972). Within an organizational system, many subsystems often interact dynamically to accomplish a shared organizational goal. Consequently, any shift or alteration in one subsystem affects the entire organization (Reimsbach & Braam, 2022; Small et al., 2021). Systems theory applies to a business's management of staff and operations, as the entire system and environment should be considered (Sony & Naik, 2020). GST can be used to understand the interdependencies of a small retail business, its customers, and its external environment.

GST can be applied across various industrial sectors and research topics. GST can be used to enhance understanding of organizational relationships, making GST an appropriate framework for grounding studies on developing customer retention strategies to meet organizational goals (von Bertalanffy, 1972). GST is critical for understand the resilience of socioecological systems (Van Assche et al., 2019). Van Assche et al. (2019) reviewed applications of GST and examined the social, ecological, and adaptive aspects of organizations and systems, finding that systems theory has significantly developed in interdisciplinary fields since von Bertalanffy (1968). One development is the application of GST to studies on customer management and retention.

The way that researchers view systems has changed since the introduction of GST. When von Bertalanffy (1968) introduced GST, a system was conceptualized as an organization or entity in dynamic interaction with its environment. Vanderstraeten (2019) investigated how GST has evolved in its application to research, finding that researchers have applied GST in broader contexts than von Bertalanffy (1968). Vanderstraeten (2019) asserted that the concept of a system, and its system viewpoint, has changed over

time in several ways. For instance, some researchers describe a system to be an entire community, with an organization defined as a subsystem (Plaza-Úbeda et al., 2020). Interactions between communities form even larger systems. Small retail businesses can be treated as systems or as subsystems within a larger community context.

GST is a framework for understanding portions of the world based on a systems model and reconceptualizing these parts into the framework of a system. This viewpoint is favored by scholars and organizational leaders who identify with the concept of an organization functioning as a system (Buchanan, 2019). Vanderstraeten (2019) ascertained that essential insights derived from GST are helpful for making a reflexive difference in organizational thinking. A reciprocal relationship exists between scholars' understanding of the world and systems theory. That is, a modern understanding of the world has been shaped by systems theory and systems theory has shaped a modern understanding of the world (Vanderstraeten, 2019).

GST is an effective theory for grounding this research. In the next section, I described the specific ways in which GST can be applied in the field of customer retention and management. I will also provide a description of the use of GST to model in the analysis of customer management, which will provide context for the development of customer retention strategies used by some small retail business leaders to promote customer retention.

### **Application of GST to Customer Retention**

Small retail business leaders in the United States face challenges retaining customers; thus, they should evaluate and employ effective customer retention strategies

to address the challenge of retaining customers (Gerea et al., 2021). GST has been applied to the problem of customer retention (Hawkins & Hoon, 2019). Hawkins and Hoon (2019) examined the application of retention strategies by small businesses in retaining customers using a systems theory approach, finding that relationships management and customer satisfaction were critical for customer retention and loyalty. Building customer loyalty requires small retail business leaders and staff to engage with customers over time, building trust and encouraging repeat purchases (von Bertalanffy, 1972). Effective customer retention strategies could be achieved by understanding the context of a customer's environment, which includes choices of other companies (Morgeson et al., 2020). Systems thinking can promote an understanding of a customer's environment, which can be used to promote customer retention.

GST involves a holistic approach to customer management, promoting successful processes by considering interconnected relationships between businesses, customers, and competitors. Customer retention implies consideration of competing businesses within a larger industrial system (Awuku et al., 2023). Building customer loyalty and retention requires business leaders and staff to engage with customers over time, building trust and encouraging repeat purchases (von Bertalanffy, 1972). Effective customer retention strategies could be achieved through incentives, providing excellent customer service, enhancing customer relationships, personalizing customer experiences, and using data-driven insights into customer needs (Lamrhari et al., 2022). Each of these strategies involves consideration of the breadth of customer needs, consistent with using a systems perspective. Each effective customer retention strategy has benefits and challenges,

necessitating that small retail business leaders evaluate which strategies are most applicable for their business. By employing effective customer retention strategies, small retail business leaders could increase customer loyalty and improve the financial stability of their businesses.

Using von Bertalanffy's GST, small retail business leaders could analyze and assess each business component that impacts customer retention within the larger context of the business and industry. A systems approach recognizes the interconnectedness of each part of the system and how each part influences the business's overall success (von Bertalanffy, 1972). By incorporating GST into their strategic planning process, small retail business leaders could develop effective retention strategies that address internal and external factors influencing customer retention (Chowdhury et al., 2022). Previous studies on customer retention in small retail businesses have found that personalizing products or services (Pizzi et al., 2022), offering loyalty programs with bonus points (Gu et al., 2022), discounts, and special offers, and utilizing technology to engage customers are effective strategies for retaining customers (Alzoubi et al., 2022). Business leaders who employ customer retention strategies while considering the systems context, could increase customer loyalty and ultimately improve the financial stability of their small retail business.

### **Expectation Confirmation Theory**

While GST theory provides an opportunity to generate significant knowledge about customer retention strategies, other theories, such as the confirmation expectation theory, were not chosen for the present study. Expectation confirmation theory consists of



four constructs that influence customer retention: (a) satisfaction, (b) expectations, (c) perceived performance, and (d) disconfirmation of beliefs (Oh et al., 2022). Expectation confirmation theory is based on the notion that consumers' expectations influence their perceptions of a product or service. Expectations are derived from a consumer's prior experiences and beliefs regarding a product or service, which guide their present perceptions and judgements related to consumption of services and products (Gupta et al., 2020). The second component of the theory, confirmation, refers to the idea that consumers seek information that conforms to their expectations, while dismissing information that isn't consistent with their beliefs (Zhao et al., 2020). Therefore, expectation confirmation theory indicates that a customer's perception of a product or service is related to perceived performance.

Expectation confirmation theory can be used to understand and explore effective strategies that small retail business leaders can use to improve customer retention. Specifically, researchers and marketing analysts use expectation confirmation theory to understand how customer expectations and confirmation of expectations influences customer retention among business enterprises (Jia et al., 2020). The expectations that customers attach to the business services or products may influence their decision to remain with a company or seek alternative opportunities from competitors (Cavallo et al., 2021). Expectation confirmation theory applies to this research topic because small retail business leaders can consider customer expectations when developing and implementing strategies to improve customer retention.

Meeting customer expectations has become increasingly complex in the retail industry due to the growth of e-commerce, the Internet, and mobile technology. Small retail business leaders should provide personalized experiences that meet customer demands. A strategic plan that includes a customer experience strategy is essential for small retail business leaders to satisfy customer expectations (Cunningham & De Meyer-Heydenrych, 2021). Numerous studies have explored customer expectations in the retail industry and how small business leaders could use strategies to enhance customer loyalty, drive sales, and improve customer experience (Ahmed et al., 2022). For instance, according to a study by W. Wang et al. (2022), customers have high expectations for product quality, delivery services, customer service, convenience, and overall experience. The study's findings indicated that excellent customer service is the most critical factor in meeting customer expectations, followed by product quality and delivery services. Wasserman-Olin et al. (2023) found that customers expect small retail businesses to be proactive by offering personalized experiences and tailored solutions. These expectations influence customer retention.

Expectation confirmation is not appropriate for this study for numerous reasons. First, customer expectations are only one factor influencing a customer's choice to remain with a company or seek services from a competing company (Lee & Lee, 2020). For instance, the availability of local service providers may play a role in a consumer's choice to repeat business with a company (Alzoubi et al., 2022). Small retail businesses with limited competitors may be more likely to retain customers than those in competitive local markets. However, this logic invokes GST, accounting for other

components and organizations within a larger industrial system. Many small retail business leaders need to fully understand their competitive market in order to successfully retain customers (Hawkins & Hoon, 2019), rendering this application of customer retention ineffective under expectation confirmation theory. GST is driven by an understanding and a dissection of customer relations, enabling business leaders to understand the nature of customer retention strategies within a larger organizational and industrial context. I chose GST because systems theory is an appropriate framework for the study. Drawing on this theoretical framework, the remainder of this literature review contains a synthesis of literature related to customer retention strategies that I used as a basis for understanding the customer retention strategies highlighted by the participants during the data collection phase of my research.

### **Customer Satisfaction**

Customer satisfaction, while not synonymous with customer retention, influences customer retention. Small retail business leaders should understand effective strategies that can enhance customer satisfaction. Customer satisfaction is defined as a customer's perceived happiness with a product or service after the purchase has been completed (Otto et al., 2020). Customer satisfaction is a feeling of fulfillment, pleasure, happiness, and relief (Widagdo & Roz, 2021). Business leaders tend to use customer satisfaction as a measure of the quality and performance of a product or service (Fared et al., 2021). When a customer purchases a product or service, customer satisfaction is associated with the customer's assessment of the product or service (Fared et al., 2021). Customer satisfaction is an important concept that influences customer retention.

Customer satisfaction is linked to customer expectations. Customers use corporate image and reputation as standard marketing benchmarks to evaluate a company's performance (Ozkan et al., 2019). Sohail et al. (2023) found that customer satisfaction derives from a customer comparing their expectations about a product or service with the actual product or service received. The authors also found that customer satisfaction influences repurchase by a customer and retention. Otto et al. (2020) further supported a relationship between customer expectations and satisfaction on continued repurchases, finding that satisfied customers made repeat purchases from a business. Therefore, a relationship exists between customer satisfaction and customers continued use of products or services, or customer retention (Otto et al., 2020; Sohail et al., 2023). By understanding strategies to enhance customer satisfaction, small retail business leaders could implement enhanced strategies to improve customer retention.

Customer satisfaction and retention is influenced by a customer's interactions with employees. The demeanor and attitude of an employee while interacting with a customer to provide a service can influence a customer's impressions of a retail business, influencing a customer's expectations (Kolar et al., 2019). Employees with favorable and pleasant demeanors contribute to a consumer's perceived level of satisfaction and influences customer loyalty (Kolar et al., 2019). Researchers and marketing analysts have also found that customer satisfaction is enhanced when the customer perceives a company to be committed through the provision of individualized services with a dedicated employee (Uzir et al., 2021). Other researchers found customer satisfaction with employee interactions influences customers' intentions to continue their service

membership, recommend the company or advertise to other potential consumers through word-of-mouth, and make repeated purchases (Meilatinova, 2021). Positive employee interactions influence customer satisfaction, which plays important role in improving customer retention.

Clear communication with customers is important for customer satisfaction. To ensure customer satisfaction, small retail business leaders should train employees to provide excellent customer service, establish clear communication channels, and promptly address customer complaints or concerns (Tlapana & Mduba, 2021). A personalized and positive customer experience could increase customer loyalty and positive word-of-mouth recommendations, ultimately driving business growth (Uzir et al., 2021). In addition, regularly seeking feedback from customers through surveys or other means could help small retail business leaders understand their customers' needs and preferences and make necessary improvements to their products and services. Small retail businesses could differentiate themselves from competitors by providing exceptional customer service and establishing a loyal customer base.

The predetermined expectations of the customer regarding the quality of an enterprise's products or services typically tend to influence their purchasing behavior and subsequent satisfaction. The quality of service that customers receive is a crucial factor in determining their level of satisfaction (Tzavlopoulos et al., 2019). Customer satisfaction is a subjective concept; satisfaction differs from customer to customer, in a product- or service-dependent manner (Otto et al., 2020). When customers receive high-quality service that meets or exceeds their expectations, their satisfaction increases accordingly

(Ozkan et al., 2019). Like satisfaction and expectations, customer satisfaction and loyalty are related, because a positive emotional or physical experience with a product on the part of the customer influences the perceived value by the customer (Coelho et al., 2020). Customer satisfaction depends on numerous physical and psychological variables, which align customer post-purchase behavior and retention (Raza et al., 2020). Small retail business leaders could view customer retention from the perspective of devising new strategies to retain existing customers and increase their satisfaction.

### **Customer Loyalty**

Customer loyalty plays a significant role in assessing whether a business fulfills customer demands and expectations. The importance of customer loyalty lies in how customer satisfaction directly influences customer expectations (Suchánek & Králová, 2019). To increase brand loyalty, small retail business leaders need successful customer retention strategies that enhance client-customer business relationships (Hamzah & Shamsudin, 2020). Using effective customer retention strategies, business leaders could better understand customers' expectations and needs in a competitive environment.

Small business leaders could enhance customer retention by improving customer loyalty. Customer retention and loyalty are essential components that significantly impact the overall success of maintaining customers (Khairawati, 2020). Business leaders should understand the relationship between customer loyalty and retention (Hamzah & Shamsudin, 2020). By adopting a holistic approach, small retail business leaders could identify effective strategies that improve customer loyalty, leading to higher customer retention rates and brand loyalty (Khairawati, 2020). Maintaining customer loyalty could

increase profits and long-term sustainability for small businesses in a competitive environment (M. Kim et al., 2020). Using a customer loyalty approach helps businesses identify and implement dynamic alterations in their operational strategies to meet changing customer needs and expectations, which could positively influence customer retention (M. Kim et al., 2020). Small retail business leaders could improve customer retention by understanding the impact of changes on customer loyalty.

Different factors can determine a customer's loyalty. Small retail business leaders tend to determine a customer's loyalty through noting how customers maintain accounts, recommend services to others, and purchase new products or services (Cornelli et al., 2020). For example, one technique is to provide lower rates for products and services based on the customer's loyalty, which can incentivize loyal customers to remain with their credit unions (Barr, 2020). Alternative strategies to customer loyalty programs can increase customer loyalty and build customer retention.

Building trust, enhancing customer service, offering a small retail business loyalty program, and providing financial advice can help with long-term customer retention. Research studies indicated that customer relationship management (CRM) positively correlates with customer retention (Emaluta & Soewarno, 2019). Factors such as customer orientation, CRM organization, and knowledge management can be positively associated with the faithfulness of consumers (Otto et al., 2020). Small retail business website usability can positively affect customer service, loyalty, and retention (McCarthy, 2021). Li et al. (2021) also confirmed that factors such as usability and customer services play a valuable role in fulfilling the customers' requirements and

yielding trustworthiness to a great extent. Some customers may benefit more from the accessibility and easiness of online services and products, which provide new and interesting possibilities compared to more traditional practices.

### ***Customer Relationships***

External and internal factors can impact customer relationships in a manner that impacts customer retention. Such internal and external factors include financial, social, and structural interactions, affecting the relationships between employees and customers buying products and services (Hu & Chaudhry, 2020). Small retail business leader may find that investing significant resources in building, maintaining, and nurturing customer relationships as part of their sales strategy can build stronger customer relationships that could improve customer retention and loyalty (Itani et al., 2019). Employing strategies that strengthen customer relationships is a continuous process, which requires nurturing relationships between a small business leader and customers to maximize mutual long-term benefits (Alzoubi et al., 2022). Some authors argue that customer relationships are essential for creating products and services (Gremler et al., 2020). Small retail business leaders can build customer retention by providing experiences that are meaningful to customers.

Customer relationships can be forged in multiple ways. However, some of the strategies used by business leaders to enhance or improve customer retention include commitment, trust, and conflict handling (Wong et al., 2020). Mitigating obstacles can disproportionately affect consumer relationships, with positive customer relationships being essential parts of a small retail business leader's business strategy (Shamsollahi et



al., 2021). Customer relationships can evolve and have a cumulative impact on customer satisfaction and retention (Otto et al., 2020). Customer relationships can affect the response to problems and the perception of conflict handling, explaining that a good relationship with the business may reduce the customer impact, and improve the resolution to service failures (Chao & Cheng, 2019). Positive experiences with small retail business employees can enhance customer retention.

As the expectations and demands of the customer increase, customers weigh their options regarding whether they want to conduct business with a small retail business. Professionalism and industry expertise assist leaders of small retail businesses in achieving their goals and objectives to attract and retain customers (Chao & Cheng, 2019). Customer relationship researchers have analyzed customer retention initiatives that support customer and employee interactions with an eye on organizational performance. Focusing on future customer retention strategies that build on the established small retail business and customer relationships will serve as a resource for soliciting consumer feedback. Customer feedback assists small retail business leaders to improve customer retention. Small retail business leaders who recognize the impact of customer relationships on customer retention may have a competitive advantage over their rivals. Small retail business leaders will become better equipped to retain customers by implementing initiatives that give customers a voice in how the company responds to customers' demands and expectations. For a small retail business to be successful, it may find considering the perspective and opinions of customers necessary to strengthen customer relationships beyond minimum employee and customer engagement. New

customer strategies that include customer opinions can expand the employee and customer engagement opportunities that strengthen the customer business relationship.

### **Customer Relationship Management**

Customer relationship management (CRM) systems are an effective tool for promoting customer retention. CRM systems provide an integrated platform that allows organizations to understand customer needs, actively track customer interactions, and manage customer relationships (Haney & Lutters, 2021). By using CRM, small retail business leaders could determine customer buying patterns, increase value for their most loyal customers, and make data-driven decisions to improve customer retention and increase customer loyalty (Nikopoulou et al., 2023). Small business leaders could utilize CRM for marketing campaigns targeting customers with specific needs and interests to build brand awareness, boost sales, and create long-term customer relationships (Haney & Lutters, 2021). Utilizing CRM is particularly beneficial for small retail business leaders, including e-commerce companies, who have the potential to acquire large and diverse customer bases (Nikopoulou et al., 2023). To maximize the benefits of CRM, small business leaders should tailor the system to their organization's needs and ensure employees receive adequate training to use the system effectively.

CRM technology is crucial in tracking customer interactions across various channels, allowing businesses to extract and analyze data on customer behavior, a necessary step in promoting customer retention. Customer behavior data could allow small retail business leaders to create targeted marketing campaigns, while improving customer service by tracking customer satisfaction and complaints, allowing businesses

to respond quickly to any concerns (Haney & Lutters, 2021). CRM technology could increase customer satisfaction with products and services, in turn, influencing customer retention (Nikopoulou et al., 2023). Therefore, CRM technology is essential for small business leaders seeking to improve customer retention (Haney & Lutters, 2021). By understanding customer needs and behaviors, small retail business leaders could use CRM to develop targeted marketing campaigns at repeat customers and improve customer service (Haney & Lutters, 2021). Understanding customer needs and behaviors could help small retail business leaders build long-term customer relationships and increase customer satisfaction retention (Zelenkov & Solntsev, 2023). By combining CRM technology with data-driven marketing strategies, small retail business leaders could create value for customers and enhance their overall experience, increasing customer retention.

CRM is a valuable tool for improving customer satisfaction and retention in businesses. The data collected from CRM could be used to create personalized products and services and develop marketing strategies tailored to each customer's needs (Zelenkov & Solntsev, 2023). Consequently, small retail business leaders could be better prepared to build long-term customer relationships, increase overall satisfaction, and gain a competitive edge (Zelenkov & Solntsev, 2023). Companies can achieve increased profits and long-term success by acknowledging the significance of CRM and its impact on customer loyalty and retention. This recognition enables them to deliver a higher level of customer service, resulting in positive outcomes (Haney & Lutters, 2021). A systematic approach to managing customer relationships, combined with CRM

technology, could help small retail business leaders build value for customers and ensure their satisfaction.

CRM can influence customer dissatisfaction, which can negatively impact customer retention. Mariia et al. (2020) found that companies lacking CRM strategies were more likely to experience customer turnover than companies with CRM. However, CRM factors can influence customer satisfaction, which can increase substantially if the organizations have a good plan for CRM in place. CRM can aid small retail business leaders in connecting with customers in a manner congruent with their expectations. CRM can be instrumental to small retail business leaders by promoting modern communication, which can build customers satisfaction through the fulfillment of the customer's expectations (Afaq et al., 2023). Customer satisfaction can be perceived as customer value and equity, which could help small retail business leaders improve customer retention through CRM.

Small retail business leaders should build positive relationships with customers. Building customer relationships takes time and requires targeted efforts by employees within an organization (Whysall et al., 2019). When businesses utilize CRM effectively, customers are more likely to be satisfied with their products or services (Ullah et al., 2020). Customer satisfaction plays a significant role in the performance of businesses, as customer satisfaction influences customer retention. Implementing effective CRM strategies allows the firms to identify customers' needs and customize products or services focused on the customer's preferences (Ullah et al., 2020). Some CRM theorists asserted that product quality and meeting customer expectations are crucial because

customer satisfaction is essential for customer engagement, trust, and loyalty (Huang et al., 2019). Small retail business leaders with effective customer retention strategies may be able to increase customer retention and reduce customer defection to competitors.

Small retail business leaders tend to believe that the customer is the organization's most important asset. CRM practices can enhance the firm's ability to meet customer preferences and purchase intentions. In the small retail business sector, CRM implementation can provide customers with additional knowledge regarding firms' products and services offerings. Small retail business leaders who use adequate CRM practices could increase customer product and service knowledge, which could influence customer satisfaction, loyalty, and retention (Whysall et al., 2019). CRM is essential for promoting customer relationships that contribute to customer satisfaction.

Greater customer satisfaction and customer loyalty aid in customer retention. Small retail business leaders who successfully implement CRM strategies such as customer loyalty programs are better prepared to distinguish between customer loyalty and customer intent to buy (Eckstein et al., 2020). CRMs could be useful for small retail business leaders by tailoring customer requirements and purchase intentions based on customer feedback. In small retail businesses, the benefit of a loyalty program could be a primary factor in enhancing customer retention. Customer satisfaction leads to customer loyalty, resulting in small retail business leaders retaining and attracting future customers.

### **Customer Engagement**

Small retail business leaders should prioritize employee engagement, which can positively influence customer engagement. Employee disengagement could decrease

customer engagement and retention (Filimonau & Magklaropoulou, 2020). Employees given work autonomy tend to be more responsible, resulting in increased trust and commitment, which influences their interactions with customers (Filimonau & Magklaropoulou, 2020). Creating an inclusive work environment is essential for small retail business leaders to promote customer engagement and prevent employee isolation, which could cause procrastination (Miller & Miller, 2020). Some small retail business leaders have responded to the challenge of creating an inclusive work environment by holding regular virtual meetings to strengthen employee relationships (Giousmpasoglou et al., 2021). Small retail business leaders who prioritize employee engagement and customer satisfaction could increase their firms' success in the competitive retail industry.

Small retail business leaders should continuously innovate and establish new economic activities to drive growth and create employment opportunities. Small retail business leaders can enhance customer engagement by leveraging continuous innovation and establishing new business activities that generate employment opportunities, thereby driving growth and contributing to overall economic development (Indriasari et al., 2019). By embracing innovation and creating employment, small retail business leaders can attract and engage diverse customers, fostering a dynamic and thriving ecosystem that benefits the business and the larger community. The dynamic nature of some local and regional economies creates a unique niche for some small retail businesses, enhancing their competitiveness alongside larger firms (Vergamini et al., 2019). Small business leaders should understand effective business strategies to operate successfully,

increase revenue, and remain in business, which include customer engagement and retention.

### ***Knowledgeable Staff***

Knowledgeable staff are critical for customer engagement. Effective customer service strategies could contribute to enhanced customer shopping experiences and increase customer retention. One such strategy is having a knowledgeable and pleasant staff, which could impact customer loyalty and lead to the success of small businesses (Almohaimmed, 2019). To meet customer expectations, small retail business leaders should prioritize recruiting and training knowledgeable staff who deeply understand their products and services (Gilboa et al., 2019). By ensuring that their employees are well-informed and equipped to provide accurate and insightful information, businesses can deliver exceptional customer experiences, foster trust and satisfaction, and ultimately improve customer retention rates (Madhani, 2020). By actively engaging with small business employees and leaders, customers can gain better product and service awareness, ultimately resulting in enhanced customer retention rates and increased brand loyalty (Gilboa et al., 2019). Small business leaders can leverage employee training to enhance workers' knowledge and skills, ultimately contributing to improved customer engagement and retention rates (Madhani, 2020). Targeted training programs enable small retail business leaders to empower employees by updating them on industry trends, improving product knowledge, and enhancing customer service skills. These programs can enhance firms' capacity to retain customers and attain long-term success.

Small retail business leaders can enhance customer retention by examining the frequency of customers repurchasing their goods or services and how customer retention correlates with staff knowledge and customer purchase intentions. Understanding the association between customer loyalty, satisfaction, and customer expectations is critical in implementing effective retention strategies (Hawkins & Hoon, 2019). By improving client-customer relationships and influencing brand loyalty, small retail business leaders could understand successful customer retention strategies (Hamzah & Shamsudin, 2020). In addition to reviewing repurchasing frequency, staff knowledge, and customer purchase intentions, small retail business leaders can further enhance customer retention by actively seeking feedback and implementing improvements based on customer suggestions and preferences (Chan et al., 2022). By actively listening to customers and making necessary adjustments to meet their evolving needs, small retail business leaders can foster strong client-customer relationships and reinforce brand loyalty, ultimately leading to successful customer retention strategies (Hamzah & Shamsudin, 2020). Through a holistic research approach, small retail business leaders could gain insights into which strategies most effectively retain customers.

Small retail business leaders could strengthen their operations and retain clients by implementing strategies that align with GST. Small retail business leaders should choose the most effective methods to ensure ongoing success and customer retention (Knowles et al., 2020). A holistic approach that involves individual and systemic changes in response to market conditions is likely to sustain small retail businesses (Hawkins & Hoon, 2019). Systems theory is significant to my research study because systems theory



accounts for environmental factors influencing small retail businesses (see Putra, 2019).

Customer satisfaction is enhanced when a business meets or exceeds the customer's expectations. Companies that prioritize staff knowledge and provide excellent customer service have the potential to inspire repeat purchases and foster customer retention.

### ***Communication Strategies***

Effective communication is critical for small retail business leaders to engage effectively with stakeholders, partners, and customers. Small retail business leaders require effective communication to understand and meet customers' needs and demands. In addition, communication strategies are necessary to retain stakeholders and customers (Laguir et al., 2019). These techniques include customer engagement strategies and communication methods to ensure that all stakeholders are actively involved in exchanging information (Gopinathan et al., 2022). Developing effective communication and engagement strategies could lead to stronger stakeholder relationships, ultimately increasing customer retention (Laguir et al., 2019). Small retail business leaders need effective communication strategies that enable prompt responses to customers' needs and inquiries to improve customer retention (Gopinathan et al., 2022). Efficient responses to customers need demonstrates the business leader's commitment to supporting and satisfying customers through prompt action and service delivery. By implementing robust communication strategies, small retail business leaders can effectively convey information, share knowledge, and guide their staff, thereby enhancing their capabilities in customer retention efforts.

Several communication, retention, and engagement strategies have been studied across various disciplines, including health sciences, education, and social sciences. These studies have shown that effective communication and engagement strategies improve individuals' retention rates and active engagement (Farrell & Brunton, 2020). For instance, using an online toolkit enhanced participant engagement and improved retention rates in health sciences studies (Moro et al., 2021). Similarly, using digital tools improved student engagement in college courses (Farrell & Brunton, 2020). Small retail business leaders could retain customers by implementing communication strategies that effectively address customer concerns and keep customers informed about business changes (Nayal et al., 2022). Clear, concise, and easily understandable communications build trust and transparency with consumers, which are critical aspects of a small retail business's image and future success in retaining customers.

Small retail business leaders must constantly evolve to meet customer expectations. Small retail business leaders should ensure that their customer experience strategies meet customers' needs and preferences (Cunningham & De Meyer-Heydenrych, 2021). The use of technology is becoming increasingly important for small retail businesses to enhance their customer experience strategies (Ahmed et al., 2022). Customers expect retail businesses to have user-friendly websites and mobile applications that offer a seamless shopping experience. Customers also expect personalized experiences, which could be achieved through data-driven insights (Cunningham & De Meyer-Heydenrych, 2021). Small retail business leaders should leverage technology and data analytics to personalize their offerings and enhance customer experience (Ahmed et

al., 2022). To build customer retention, small business leaders should offer excellent customer service, tailored solutions, and personalized experiences.

### ***Showrooming***

Showrooming is an important customer engagement strategy. Showrooming provides customers with the opportunity to closely examine products and services in a showroom before making a purchase. Showrooming involves customers researching and inspecting products in brick-and-mortar locations (Jain & Shankar, 2023). Research has shown that customers are more likely to engage in showrooming when prices at physical stores are higher than online prices (Su & Tian, 2023; J. Wang & Wang, 2022).

Showrooming challenges small retail business leaders of with physical store locations to compete with online retail businesses on pricing (Li et al., 2021). Small retail business leaders can use showrooming to aid in customer retention by providing a physical location for customers to interact with products.

Customer showrooming can positively or negatively influence customer purchases and retention. Researchers have found that customers tend to engage in showrooming when there is a noticeable price disparity between online or brick-and-mortar retailers and physical stores (Hsieh et al., 2023). Customers who engage in showrooming are likely to visit multiple stores to compare similar products or services, which is a threat to customer retention (Viejo-Fernández et al., 2020). The convenience of online purchases also drives customers to engage in showrooming, such as when returning a product that was delivered to the customers' homes (Guo et al., 2022). Small business retail leaders should understand showrooming factors to develop strategies that

could counter threats posed by online retail businesses (Guo et al., 2022). Research indicates that personalized customer experiences and exceptional in-store service can effectively counter the threat of showrooming and increase customer retention (Viejo-Fernández et al., 2020). By providing a tailored and memorable shopping experience, small business retailers can foster a sense of loyalty and engagement that transcends the convenience and price advantages offered by online and large retailers.

To address the threat of showrooming, small retail business leaders should prioritize providing customers with access to detailed product information and competitive prices. Engaging in price competition with online retail businesses could also help to attract and retain customers who could otherwise use showrooming to make purchases (M. Kim et al., 2021). Demographic elements, such as age, gender, and income, could also influence customers' shopping intentions (James et al., 2019). For example, younger, higher-income individuals from Generation Y, individuals born between 1981 and 1996, tend to prefer showrooming, while older customers, such as the Baby Boomers, prefer webrooming (Kotler et al., 2021). By keeping apprised of showrooming trends and understanding customer behavior, small retail business leaders could adapt their customer retention strategies.

### **A Strategic Plan for Customer Retention**

A well-designed strategic plan is vital for small retail business leaders to retain customers and ensure long-term success. Strategic plans should incorporate innovative strategies, focusing on industry knowledge and skills to gain a competitive edge (Tu & Wu, 2021). Marketing strategies and capabilities are critical components that could

impact brand loyalty and customer willingness to pay for repeated products and services (Santos & Schlesinger, 2021). By expanding social media and marketing strategies, small retail business leaders could better understand their customers' needs and foster stronger relationships, leading to customer retention.

Identifying insights and trends in customer behavior through social media and marketing could help small retail business leaders assess cost-saving initiatives and promote organizational growth. Small business leaders should consider implementing retention strategies like CRM systems to increase customer satisfaction and retention (Cavaliere et al., 2021). Understanding the target market and identifying key customer behavior drivers are crucial to creating a successful customer retention strategy (Dsouza & Sharma, 2021). To ensure customer retention, small retail business leaders should go beyond offering great products or services, which requires a solidified strategic plan (Aryani et al., 2021). Small retail business leaders should engage in strategic planning, including innovative marketing techniques and effective customer relationship management tactics (Malicha, 2022). Businesses can create a lasting impression on their customers by investing in strategic planning methods. Satisfied customers are more likely to spread positive word-of-mouth and refer future customers, leading to increased growth and success for the business.

### **Marketing Strategies**

Amidst the COVID-19 pandemic, small retail business leaders faced disruptions to business operations and rapidly adapted their marketing strategies to navigate the new retail and service environment. As marketing became increasingly challenging, small

retail business leaders needed to comprehend and discover innovative methods to retain customers (Affandi et al., 2020). To gain a competitive edge, small businesses should leverage their marketing activities to convert customers into relationship marketing-based assets (Horng et al., 2022). By turning customers into market-based investments, businesses could establish positive word-of-mouth referrals, significantly improving customer retention and attracting new customers (Grossmann et al., 2019). To stay competitive in the ever-changing retail industry, small retail business leaders should adopt flexible strategies that can be regularly reviewed and adjusted to align with customer demands and market trends (Canhoto et al., 2021). An effective marketing strategy enables businesses to evaluate the most effective ways to meet customer expectations and enhance satisfaction.

### ***Use of Social Media for Business***

One of the fastest-growing technologies is social media. Small retail business leaders can use data derived from social media platforms to establish crucial business insights (Heavey et al., 2020). Social media is an accessible communication technology that transforms the way small retail businesses use web-based communications. There are multiple interactive platforms widely used for businesses, including Facebook, LinkedIn, and Twitter (Askar et al., 2022). While social media can be a powerful tool for marketing and connecting with customers, some researchers advise using restraint when employing social media. The social media consumer culture fosters a sense of immediate access to business personnel (C. P. Chen, 2021). However, small retail business employees may not be available at all times, which may hinder customer satisfaction. Small retail

business leaders can include their online service availability on their social media pages, informing customers of their availability for direct messaging. Social media, once a platform for socializing with family and friends, has grown to provide a platform for marketing professionals to attract new customers and retain current ones (Liao et al., 2022). Small retail business leaders can enhance the value of social media by building relationships with followers, connecting to current customers to increase customer retention.

For many businesses today, social media marketing is an important objective for business executives. Social media allows users to share experiences and exchange opinions on services and products that promote word-of-mouth and referral business (Mahmood et al., 2019). Social media allows for current customers to keep apprised of new products and offerings by a company, which can help promote customer retention (Qalati et al., 2022). Targeted social media responses have also been shown to increase customer satisfaction, which influences customer retention (Shao et al., 2020). Small retail businesses can benefit by using social media to enhance their services to retain current customers and attract new ones (Askar et al., 2022). Social media platforms can help small retail business connect and reconnect with current customers while advancing new products and services.

Social media can assist small retail business leaders in projecting the company's objective by capitalizing on customers' insights and using those insights to develop, enhance and promote new and current products. Social media also provides a platform for customers to use word-of-mouth communication to promote a small retail business

(Wicaksono et al., 2021). With increasing advances in technology related to social media, small retail business leaders can adapt this technology to promote their businesses and retain customers (Infante & Mardikaningsih, 2022). Businesses can engage with loyal and repeat customers and influence their perception and expectation of products and services, which may influence their satisfaction (Olsson & Bernhard, 2021). Most social media platforms are free or relatively low-cost and offer small retail business leaders a platform to build positive customer relationships with existing customers and promote customer retention.

### ***Webrooming***

Webrooming has become a popular method small retail business leaders use to enhance customers' purchasing experience and sense of savvy buying. Webrooming refers to the practice of researching products online before visiting a physical store location to purchase an item (Aw et al., 2021). Customers seeking deals may be influenced by the research across multiple small retail businesses websites for their overall impressions of savings and value (Flavian et al., 2020). Webrooming may be overshadowed by showrooming, which can make customers interact physically with a product, leading to additional purchases (Aw, 2019). Small retail business leaders could leverage webrooming to provide customers with accurate and updated online product information to couple with positive in-store experiences (Flavian et al., 2020). Small retail business leaders are advised to utilize webrooming strategies that cater to various shopping intentions, addressing both the cognitive and affective aspects of customers (Haridasan et al., 2021). Utilizing webrooming strategies has the potential to positively



impact customer retention (Flavian et al., 2020). Small retail businesses could better retain their customers by offering various purchasing options and using webrooming as a marketing strategy.

### ***Digitization***

Digital technology, or digitization, is the use of digital technologies to innovate a business model, create new revenue streams, and create value-producing opportunities in industrial ecosystems. Small retail business leaders could leverage digitization to identify and capitalize on new opportunities in the competitive retail landscape (Ishfaq et al., 2022). With the rise of competition in the retail industry, small retail business leaders should adopt and employ innovative digital technologies to remain relevant (Anthony Jnr, 2021). Digital technologies have transformed the customer experience, enabling companies to establish deeper relationships and gain insights into customer preferences and behaviors (Zaki, 2019). Digital technology could help small retail business leaders innovate their business models and stay competitive in the market.

Artificial intelligence (A.I.) is another innovative strategy used in conjunction with social media to help identify changes in customer behaviors and meet customer demands. Small retail business leaders may find A.I. useful for analyzing social media content (Basri, 2020). A.I. can enable small retail business leaders to acquire more precise consumer behavior information and quickly make effective marketing decisions (Mason et al., 2020). A.I. could improve customer experience and influenced customer satisfaction and retention (Battisti et al., 2021). Utilizing advanced technology could impact small retail businesses' profits long-term, and small business leaders should

consider investing in digital technology to stay competitive (Capatina et al., 2020). Small business leaders may find that A.I. may aid in identifying customer purchasing behavior that impacts customer retention.

Advanced technology can be an asset in improving customer engagement and retention. Digital technology improves customer engagement and retention by offering personalized experiences and targeted marketing campaigns (Battisti et al., 2021). Digital technology has transformed how customers interact with retailers and presents a great potential for improving customer experience, increasing sales, and enhancing customer retention and engagement (Battisti et al., 2021). By fully leveraging technology, small retail business leaders could gain a competitive edge in the retail industry by providing increased value to their customers based on personalized needs (C. C. Chen et al., 2021). Digitalization enables small retail business leaders to monitor consumer behavior and preferences, which enables them to tailor their products and services, thereby gaining an industry advantage (Battisti et al., 2021). Small retail business leaders should make a concerted effort to leverage digital technology to remain competitive and promote customer retention.

Small retail business leaders should consider potential disruptions to existing customer relationships and processes when implementing digital technology. To ensure ethical responsibility, digital technologies should be transparent and benefit customers without taking advantage of the customers' privacy (Quach et al., 2022). However, the financial burden of significant investments in technology, personnel, and data management presents a challenge for many small retail business leaders (C. C. Chen et

al., 2021). Small retail business leaders should be strategic and thoughtful about digital investments (Anthony Jnr, 2021). Digital technology presents an opportunity for personalized customer experiences and increased engagement and retention (Anthony Jnr, 2021). Small retail business leaders should consider using A.I. and other available digital technology to promote customer engagement, satisfaction, and retention.

### **Disruptions to Customer Retention**

Disruptions to customer retention have become a pressing concern in today's rapidly changing business landscape. As markets evolve and customer expectations shift, small retail business leaders face new challenges and obstacles in maintaining long-term relationships with their customers (Sun et al., 2020). A strategic plan could help business leaders investigate retention strategies that keep customers and impact profits (Sun et al., 2020). With an effective customer retention strategy, small retail business leaders could succeed and sustain their businesses in a rapidly changing environment (Sun et al., 2020). Small retail business leaders faced unprecedented challenges during the pandemic and post-pandemic periods, compelling leaders to reinvent their strategies to maintain and strengthen customer relationships in a new workplace climate (Filimonau & Magklaropoulou, 2020). Customer retention became a critical priority, necessitating short-term and long-term plans to survive the disruptions and maintain business operations effectively (Zhang et al., 2022). Failure to have a solid retention plan could lead to declining customer loyalty and new business. Despite the pandemic's negative impact, small business leaders should adopt effective strategies to overcome the challenges and ensure survival.

Small business leaders faced significant challenges during the COVID pandemic, including state and federal restrictions that affected employee retention. These challenges also impacted customer retention strategies to successfully implemented resilience-building strategies focused on human resource practices before, during, and after lockdowns (Chu et al., 2020). To ensure customer safety and health, managers prioritized safe work environments and personal protective equipment for employees (Filimonau & Magklaropoulou, 2020). However, the pandemic caused supply and demand concerns, with restricted operating hours and supply chain disruptions that impacted customer loyalty. Small business leaders should adopt new and improved technology and strategies to retain customers during disruptive events like the pandemic.

### **Summary of Literature Review**

GST is an expansive framework for studying and understanding customer retention strategies used by small retail business leaders to effectively retain customers and prevent customer attrition. GST accounts for critical components in a small retail business's environment, considering customer and employee that promote customer retention (von Bertalanffy, 1972). GST is used in the study of customer retention to examine connections and linkages between different aspects of a customer's intention to repeat purchases and products (Kumar & Ayodeji, 2021). This can aid academics and practitioners in identifying inefficiencies in current customer retention strategies, as well as developing new strategies to promote customer retention.

Customer retention is related to customer satisfaction. Satisfied customers are more likely to engage in repeated purchases of products or services than dissatisfied

customers (Hawkins & Hoon, 2019). Small retail business leaders can use a variety of strategies to increase customer retention, including developing a strategic plan (Närvänen et al., 2020), innovative marketing tools (Affandi et al., 2020), and social media (Infante & Mardikaningsih, 2022). Increasing communication with customers on various platforms can promote customer engagement and drive repeated use of products and services (Eisingerich et al., 2019). Small retail business leaders should prioritize customer retention to increase profitability. The research findings may be applied to the applicable business problem of customer retention by giving a framework for understanding effective customer retention strategies employed by successful small retail business leaders.

### **Transition**

The goal of this study was to explore the strategies U.S. small retail business leaders use to build customer retention. Section 1 contained information about the foundation of the study, the problem and purpose statement, and the nature of the study. A summary of challenges that small retail business leaders encounters when retaining customers was provided in the foundation of the research and problem statement. The research question and interview questions were presented. The section also contained descriptions of the theoretical framework, operational definitions, assumptions, limitations, delimitations, and the significance of the study. Section 1 also contained a review of the professional and academic literature, which focused on key variables related to customer retention. The rationale behind the research problem was supported by the literature review in Section 1. Section 2 will contain a description of the

methodology that will be used in this proposed study. An overview of the research study and my role as the researcher, a discussion of the participants, research methods and design, population and sampling, and ethical research will be provided. Section 2 will also include data collection instruments, data organization techniques, data analysis, reliability and validity, transition, and summary. Section 3 will include findings of the study, key themes, recommendations for future studies, reflections, and conclusion of the study.

## Section 2: The Project

Implementing strategies to optimize customer retention is critical in all industries, especially small retail businesses. According to the U.S. Chamber of Commerce (2022), there are approximately 3.2 million small retail businesses in the United States. Leaders of small retail businesses typically strive to maximize their firms' competitiveness and retain valued customers. In this study, I examined strategies that small retail business leaders use to promote customer retention using GST as a framework for my analysis.

In Section 1, I described the background of the problem statement, the problem, and the purpose statement, and conducted a review of the academic literature. In Section 2, I review the purpose statement of the study. I present methodological information, including the role of the researcher, participants, the research methods, and the research design. In addition, I also provide a detailed discussion of the population and sampling, data collection and techniques, data techniques, data organization techniques, and data analysis. I conclude Section 2 with a description of the reliability and validity of the study.

### **Purpose Statement**

The purpose of this qualitative pragmatic inquiry was to explore successful strategies that some U.S. small business leaders use to improve customer retention.

### **Role of the Researcher**

My role as the researcher was to collect data about strategies that small retail business leaders use to build customer retention. Qualitative research requires researchers to take on multiple roles. Unlike quantitative researchers who collect data through

questionnaires or surveys, qualitative researchers function as human instruments to collect data (Merriam & Grenier, 2019). My role as the researcher in the data collection process was to ask the interview questions, use probing questions when clarification was needed, interact with participants during the interview process, and record data.

Researchers must be aware of the challenges associated with qualitative research (Dewey, 1933). The researcher collects and analyzes data after initially conceptualizing and formulating the research problem. Translating Dewey's five steps into a research-oriented framework, the initial encounter with a problematic situation amounts to the formulation of a research question that has no current answer. Reflecting on the nature of the research question leads to a suggested solution in the form of a research design. After that, evaluating the likely consequences of acting on this solution requires further reflection on the kinds of results that would arise from pursuing Dewey's thematic approach (Dewey, 1933).

I followed the guidance of Dewey's (1933) thematic approach to systematically collect, analyze, organize, and present qualitative research findings. Specifically, as a qualitative researcher, I completed each of the five steps of Dewey's pragmatic inquiry involving (a) data collection, (b) data organization, (c) data analysis, (d) data interpretation, and (e) review of the academic literature to gather background information regarding the research problem. In this pragmatic inquiry, I was the primary research instrument to collect data addressing the research problem and purpose. I ensured that the data gathered were secure and kept in a locked storage box for 5 years, where I would be the only person with the key to access the data.



One of my roles as a researcher was to collect and analyze data on the strategies that small retail business leaders use to promote customer retention. Other roles included recruiting and conducting interviews with participating small retail business leaders, audio-recording the virtual semistructured interviews with participants to collect verbal data, transcribing the audio recordings, and coding the data for organization into themes. In this study, I accessed the participants using a participant recruitment flier (see Appendix A), an informed consent form, and an interview protocol (see Appendix B).

Qualitative researchers must also mitigate personal biases to avoid confounding the study results. According to Yin (2018), researchers can use reflexivity protocols to mitigate researcher bias and enhance the trustworthiness of the findings in a qualitative research study. One of my roles as the researcher was to ensure that my personal preconceptions and biases did not interfere with the results and outcomes of the study. As a small retail business owner for 22 years, I had an interest in customer retention. To mitigate bias, I did not recruit any participants that I knew personally. I used multiple measures to promote the trustworthiness of the study's findings. First, I used an informed consent form so that participants were informed about the risks and benefits of the study and ensured their voluntary participation in the study. Second, I used an interview protocol during the interview process to prevent any potential personal bias from interfering with data collection. The interview protocol ensured that I asked each participant the same question in the same order. Third, I used member checking for participant data review (see Candela, 2019). Fourth, I kept a research journal to log all my activities related to this research study and made reflexive notes about my thoughts

pertaining to each step in the research, following McGrath et al. (2021). These mechanisms helped mitigate the potential of research bias in this study.

Researchers must act in accordance with ethical standards. Following the guidance of the Belmont Report, I strictly followed the ethical guidelines provided to ensure that each participant and their responses are protected (see National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979). I followed *The Belmont Report's* protocol by using an informed consent form delineating the details of the study, such as benefits, purpose, research procedures, and risks. The Belmont Report aims to ensure that researchers adhere to three principles, namely respect for persons, beneficence, and justice (Paxton, 2020). I showed respect for persons by informing the participants about the risks and benefits of participating in the study by using an informed consent protocol. The informed consent form details the participants' voluntary participation in the study. It provided participants with information regarding their right to withdraw from the study at any time for any reason. There were additional measures used to follow the guidance of The Belmont Report. First, I completed the Collaboration Institutional Training Initiative (CITI) training course on protecting human research participants. Second, I complied with all Walden University research protocols and followed the Institutional Review Board (IRB) regulations. These measures ensured that I complied with the provisions of the Belmont Report.

### **Participants**

Participants were recruited in several phases. In Phase A, I used my professional network and requested that individuals in my network distribute my recruitment flier (see

Appendix A) to individuals who were leaders of small retail businesses in the DMV area. To prevent selection bias, I excluded individuals I directly interacted with in professional or personal settings. In Phase B, I used social media to distribute my recruitment flier. I obtained the permission of moderators in Facebook groups aimed at supporting United States small retail businesses to post recruitment fliers on their groups' platforms. Participants were selected based on meeting the inclusion criteria for the study, which included the participants being (a) over 18 years of age, (b) the leader of a small retail business in the DMV, and (c) having implemented successful customer retention strategies. Qualitative research assumes that the participants have in-depth knowledge about the phenomenon being investigated (Yin, 2018). The small retail business leaders in this target group were suitable for this research study because they had direct knowledge of the customer retention strategies used to successfully retain customers in their firms.

I established working relationships with participants by building a positive rapport with them. Researchers develop strong working relationships with participants by adhering to the provisions of The Belmont Report (Paxton, 2020). Participants treated with respect are more likely to provide detailed and insightful responses to interview questions than those treated disrespectfully (Grady, 2022). Therefore, I established a working relationship with participants by treating them with dignity and respect in a manner consistent with The Belmont Report.

## **Research Method and Design**

Researchers can choose between three main types of research methods: qualitative, quantitative, and mixed. I used the qualitative method to investigate the strategies that small retail business leaders use to promote customer retention. Within the qualitative tradition, researchers can choose between various research designs, including case study, phenomenological, ethnographic, and general pragmatic inquiry. In this study, I selected the pragmatic inquiry study design.

### **Research Method**

To address my research question, I used the qualitative method to explore the strategies that some United States small retail business leaders use to promote customer retention. Qualitative research involves an in-depth investigation into a phenomenon by interacting with knowledgeable participants (Yin, 2018). Analyzing qualitative data allows researchers to understand attitudes, perceptions, and cultural factors influencing individuals' behaviors and choices (Creswell & Poth, 2018). Qualitative research allows researchers to contextualize their findings and comprehend how theories apply in different settings (Green & Thorogood, 2018). Participant interviews, for example, could provide a more nuanced understanding of the reasons behind decisions and the persistence of certain behaviors across contexts (Creswell & Poth, 2018). Qualitative research methods allow researchers to capture rich and in-depth data beyond the capacity of quantitative measurements, allowing for a deeper understanding of the complex interplay of attitudes, behaviors, and social dynamics that influence business operations.

The qualitative research method allows for a subjective interpretation of experiences and words, providing a flexible means of data collection, analysis, and interpretation. For this study, examining successful strategies that small retail business leaders utilize to retain customers, the qualitative approach was well-suited to collect rich data and capture participants' experiences that may not be assessable using a quantitative approach (see Yin, 2018). Unlike quantitative research, which typically involves statistical equations and hypotheses, qualitative research is interpretative and descriptive, with verbal text that can reveal complex meanings not reducible to a set of relationships between variables (Krippendorff, 2013). I chose a qualitative research method because it allowed me to identify and explore successful customer retention strategies in-depth from knowledgeable participants.

I did not choose the quantitative or mixed research methods for this study. Quantitative research involves the use of statistical analysis to evaluate hypotheses regarding the relationship or correlation between variables (Krippendorff, 2013). Quantitative research aims to find valid mathematical representations for empirical phenomena, usually functional relations between variables (Bianchi & Squazzoni, 2019). My study did not involve identifying relationships between quantifiable variables. Mixed method involves using both quantitative and qualitative methods in an integrative fashion (Wasti et al., 2022). My study lacked a quantitative research question, rendering mixed methods inappropriate for this study. Because my study focuses on strategies some United States

small retail business leaders used to retain customers, a qualitative, not quantitative, or mixed methods approach was most suitable for this study.

### **Research Design**

For this research study, I chose the generic pragmatic inquiry research design. There are six main types of qualitative research designs: pragmatic inquiry, case study, phenomenological, ethnography, narrative inquiry, and descriptive (Busetto et al., 2020). The pragmatic inquiry design was appropriate to explore the strategies that small retail business leaders use to retain customers. Researchers using the pragmatic inquiry study design collect in-depth data from multiple sources. The qualitative pragmatic inquiry design allows researchers flexibility in examining questions related to how and why a phenomenon occurs in a given context (Kekeya, 2021). In this case, the phenomenon under investigation was successful customer retention strategies used by small retail business leaders. The aim of this study was to identify and explore strategies some small retail business leaders used to promote customer retention, a purpose consistent with a pragmatic inquiry design.

I ruled out other qualitative research designs, including phenomenology, ethnography, and narrative inquiry research designs. Phenomenology is used by researchers seeking to understand the lived experiences of individuals (Moustakas, 1994). I did not choose a phenomenological research design because the purpose of this study was to explore effective strategies for promoting customer retention, not to explore the lived experiences of small retail business leaders. Researchers use ethnography to examine a population's culture and social interactions over an extended period of time

(Wutich & Brewis, 2019). The aim of this study was not to examine the culture or social interactions of small retail business leaders, but rather to understand the strategies they employ to promote customer retention. An ethnographic research design was therefore not chosen for this study. Researchers use a narrative inquiry research design to retell participants' events and experiences, often through their life stories. I did not choose a narrative research design because it was not appropriate for answering the question of effective strategies small retail business leaders use to promote customer retention. I chose a pragmatic inquiry research design because it was most appropriately aligned with the purpose of this study.

Qualitative researchers should aim to achieve data saturation, which influences the strengths of the conclusions that can be drawn. Data saturation is the point in data collection when interviewing more participants would not result in the identification of new information (Braun & Clarke, 2021). Some researchers have conducted empirical studies. For example, Guest et al. (2020) found that in interview-based qualitative studies, data saturation was reached after interviewing eight participants in 98% of studies. A sample size of at least 10 participants proved sufficient to reach data saturation. Data saturation is observed when participants' ideas begin to show repetition (Low, 2019). However, if data saturation had not been reached after 10 interviews, I would have continued interviewing participants until the study reached data saturation. A lack of data saturation would have been evidenced by Participants 9 and 10 contributing ideas and generating codes not previously discussed by the other study participants.

## Population and Sampling

The general population of this study was small retail business leaders in the United States. The target population was 10 small retail business purposefully sampled small retail business leaders in the United States who successfully employed strategies to promote customer retention. Participants were selected based on meeting the inclusion criteria for the study, which included the participants being (a) over 18 years of age, (b) the leader of a small retail business in the DMV, and (c) having implemented successful customer retention strategies.

The choice of a sampling technique is critical in qualitative research. Researchers often choose between convenience, purposeful, and snowball sampling (Yin, 2018). Convenience sampling is used to conveniently select participants based on ease of access, or proximity to the researcher (Stratton, 2021). Purposeful sampling is a sampling technique in which the researcher selects information-rich cases based on a set of predetermined qualifying criteria (Staller, 2021). In snowball sampling, a researcher asks current study participants to refer other individuals who meet the study's inclusion criteria (Parker et al., 2019). I used purposeful sampling to identify participants who were knowledgeable about the phenomenon of strategies to promote customer retention by small retail businesses because this sampling technique allowed for the identification of participants with the in-depth knowledge needed to answer the study's research question. Purposeful sampling is beneficial for qualitative research because it allows researchers to obtain valuable, detailed information from the diverse participants with limited research resources (S. Campbell et al., 2020b). Purposeful sampling also mitigates some aspects of



sampling bias associated with other forms of sampling, such as convenience or quota or stratified sampling (Baltes & Ralph, 2022). I used the purposeful sampling technique to select small retail business leaders with extensive knowledge of successful strategies promoting customer retention.

The sample consisted of at least 10 purposefully sampled small retail business leaders from at least 10 small retail business leaders in the United States who have successfully employed strategies to promote customer retention. A sample size of 10 participants was chosen because this sample size should allow for data saturation to be reached. Data saturation is the point in the data collection and analysis process when conducting additional interviews does not generate new insights or ideas (Low, 2019). Data saturation was evidenced by no new codes being generated by a participant's interview. If I had observed that data saturation had not been reached after interviewing 10 participants, I would have continued interviewing until I reached saturation.

A recruitment flier was used to identify participants and assess their eligibility for the study. The recruitment flier (Appendix A) contains a QR code linked to a participant screening questionnaire that assesses a potential participant's eligibility for inclusion in the study. See Appendix C for a copy of the questionnaire. The questions on the screening questionnaire are as follows:

1. Are you 18 years of age or older?
2. Are you the leader of a small retail business in the District of Columbia, Virginia, or Maryland? [Yes/No]

3. What state is your small retail business located in? [District of Columbia/Maryland/Virginia]

Have you demonstrated success in promoting customer retention? [Yes/No]

Using the participant screening questionnaire, I evaluated whether potential participants were eligible for inclusion in the study. For inclusion in the study, participants must have answered Question 1 indicating that they are 18 or older and answered yes to Questions 2 and 4. Any other combination of answers disqualified the potential participant from inclusion in the study.

The chosen interview setting was appropriate for this proposed study. I used the Zoom telecommunications software to conduct virtual interviews with small retail business leaders in the DMV area. Researchers have shown that the Zoom platform is a safe, reliable platform for conducting qualitative research interviews (Gray et al., 2020). Zoom interviews have important benefits, including convenience and cost-effectiveness regarding recruitment inclusivity (Oliffe et al., 2021). Therefore, the Zoom telecommunications platform was appropriate for conducting the semistructured interviews in this study.

### **Ethical Research**

I followed ethical guidelines during this research study. This research study was limited to work-related interviews, which posed minimal risk to the participants, and no sensitive or emotional topics were explored. I submitted the study for approval through the Walden University IRB application process and only began collecting data once authorization and approval had been granted. The well-being of the participants was

ensured throughout the study by adhering to established ethical norms, as stated in The Belmont Report (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979). I upheld the principles of justice, kindness, and respect for people throughout the study.

I used an informed consent form to ensure that each participant understood the details of the study and voluntarily agreed to participate in the research. After potential participants identified their interest in the study by filling in the participant screening questionnaire and were deemed eligible for the study, I emailed them the informed consent form. The informed consent form addressed ethical issues, including the risks and advantages of participating in the study, the participant's right to withdraw, and the procedures I used to ensure their confidentiality. Specifically, to safeguard the participants' confidentiality, I communicated with them only through secure methods. I ensured that the participants knew that they could withdraw from the study at any time for any reason through the informed consent process. At the time of the interview, I also reminded participants that they could withdraw from the study at any time. Participants were asked to email me if they decided to withdraw from the study. There were no incentives given to participants or payment for participation in the study.

I labeled all participant-derived data files, including informed consent forms, screening questionnaires, audio recording files, and interview transcripts with participant numbers (Leader 1, Leader 2, ..., and Leader 10). If a participant mentions information that could reasonably identify them, including their place of employment, I redacted that information from their interview transcript to protect their confidentiality. Secondary data

collected from the participants in the form of company documents were also redacted to remove company names and any other sensitive information. Public company documents were stored using the participants' pseudonyms for data identification purposes. I will safely store the informed consent forms and raw data, including recording, transcripts, and data analysis, for 5 years after CAO approval. I stored all research-related materials and data on a password-protected, encrypted cloud drive. After 5 years, I will destroy the data. The participants of this study were not offered any incentives. IRB Approval # 10-05-23-1049232.

### **Data Collection Instruments**

There were two instruments in this pragmatic inquiry. The researcher was the first instrument. The second instrument was the participant screening questions (see Appendix C) consisting of open-ended questions that were part of the interview protocol that was used to collect qualitative data. I developed the interview questions based on the study's purpose and research question. The interview focused on key inquiries about the participants' perspectives on successful customer retention strategies. The open-ended interview questions allowed for a systematic exploration of the participants' experiences with customer retention. The public company documents collected from the participants were scrutinized to identify customer retention strategies. I enhanced the reliability and validity of the data collection process through member checking. Member checking enhances the study's trustworthiness by giving participants an opportunity to ensure their thoughts are consistent with the researcher's interpretations (Candela, 2019).

An expert panel review was used to validate the interview protocol. Expert panel review using industry experts is a mechanism of content validation of interview questions in qualitative studies (Elangovan & Sundaravel, 2021). I validated the interview protocol by submitting the interview questions and protocol to my committee for expert panel review. I incorporated all changes and feedback into the interview protocol before submission to the Walden University IRB for approval. This procedure ensured that the interview protocol addressed the research questions within the chosen conceptual framework for the study.

### **Data Collection Technique**

The participants were recruited as described in the Participants subsection. Participants interested in participating in the study viewing the recruitment flier scanned a QR code containing a link to a participant screening questionnaire (see Appendices A and B). After participants filled in the questionnaire, I notified them by email of their inclusion or exclusion from the study. Participants who met the inclusion criteria were invited to participate in the study when I sent them the informed consent form. Participants were instructed to read the informed consent form and, if they wished to participate in the study, reply with the words “I consent.” The informed consent form explains the study’s voluntary nature and the participants’ freedom to discontinue participation at any time.

Once participants completed and submitted the informed consent form, I emailed them to choose a time and date to participate in the semistructured interviews. At each participant’s selected time and date, one-on-one interviews were conducted via Zoom

telecommunications software. The interview method was suitable for the study, as the method enabled direct engagement with small retail business leaders in the DMV with successful customer retention strategies. I followed the interview guide (see Appendix B), posed the approved open-ended questions, and facilitated the interview sessions by communicating clearly with the participants. Each participant participated in one interview lasting between 45 and 60 minutes, which was sufficient time for the participants to expand on their point of view.

Semistructured interviews have several advantages and are an effective data collection tool for qualitative research studies. Interviews can proceed in multiple formats, including in-person, virtual, or written interviews. I chose to use virtual interviews using the Zoom software because this modality offers researchers flexibility with scheduling and allows for observation of verbal and non-verbal behaviors (see Yin, 2018). Semistructured interviews allow researchers to ask clarifying or probing questions to gain further insight, especially if their primary response lacks depth or is insufficient (Brown & Danaher, 2019). For this study, I followed the interview protocol, which contains open-ended questions (see Appendix B), and asked follow-up questions when I needed clarification on a participant's response.

Semistructured interviews have some disadvantages. For example, semistructured interviews can take considerable time and require the researcher to have multiple exchanges with participants to schedule and complete the interviews (Yin, 2018). Interviews that take place virtually, such as the ones in this study, could also be impacted by technological or connectivity considerations. This limitation can be mitigated if the

researcher pilot-tests the interview platform and recording equipment. I conducted a pilot test of the semistructured interview protocol with a colleague who could answer the questions reasonably. This allowed me to test the interview and recording platforms.

On the day of each participant's interview, I kept a document trail of the interviews, audio recording the interview with the explicit permission of the participants. Keeping an audio trail will allow me to ensure the audio is transcribed accurately (see Yin, 2018). I aimed to obtain a rich and thick set of data from the participants, which reduces researcher and participant bias and improves data saturation (see Johnson et al., 2020). I asked probing questions and requested clarification on incomplete or partial answers to promote obtaining a thick description of the phenomenon. After the interviews were complete, I transcribed the interviews. First, I used the Otter.ai automatic transcription tool. Second, I compared the interview transcripts line-by-line with the audio recording to ensure the accuracy of the transcripts. Any personally identifiable information revealed by the participants, such as their names or places of employment, will be redacted to preserve the participants' confidentiality.

I used member checking to enhance the validity and reliability of the study's findings. Member checking is another quality control mechanism that researchers use to enhance the credibility of their qualitative studies (Candela, 2019). During member checking, I emailed each participant a one-page summary of their analyzed data to ensure my interpretation of their responses was consistent with their thoughts and ideas.

### **Data Organization Technique**

A research log helped me organize and categorize my data. In my research log, I noted the procedures I used to conduct the research study. During the study, I coded each participant's interview transcripts and question responses using a pseudonym, such as Leader 1, Leader 2, Leader 3, ... and Leader 10 to ensure participant confidentiality. I will organize data using NVivo Version 14, a qualitative data analysis software that can be used to manage and store research data (see Alam, 2021). The NVivo program helped me keep an accurate record of the research process, providing a platform to make reflexive memos. Secondary data collected as company documents from the participants was similarly coded with the participants' pseudonyms and uploaded to NVivo for organization purposes. I will also use a reflexive journal to make notes regarding my perceptions of the participants' responses. Journaling is a reflexivity protocol that researchers can use to assess their reflexivity and mitigate researcher bias (McGrath et al., 2021).

Data were managed rigorously to preserve participants' confidentiality. I stored all electronic data collected during my study on a secure, password-protected, encrypted cloud drive. The password was known only to me. I kept copies of the informed consent forms in a separate password-protected, encrypted file on the cloud drive. Data will be stored for 5 years following my anticipated year of degree completion. After 5 years have elapsed, I will destroy all electronic data, as mandated by the Walden University IRB.



## Data Analysis

Qualitative researchers are responsible for conducting data analysis to present valid and reliable findings, while enhancing the trustworthiness of the study. Data analysis is a methodical and systematic process that allows researchers to extract meaningful themes and patterns from the collected data (Braun & Clarke, 2019). According to Kiger and Varpio (2020), qualitative researchers can use one of five main theme-based data analysis: (a) comparative analysis, (b) content analysis, (c) cross-case synthesis, (d) narrative synthesis, and (e) thematic analysis. I used Braun and Clarke's (2019) method for thematic analysis, using the NVivo Version 12 software for data organization and analysis (see Alam, 2021).

I conducted an in-depth examination of relevant business documents. I thoroughly examined several data sources, including documents, interview notes, transcripts, and recordings, to identify common patterns, subjects, and explanations during each review. This process was aimed at achieving data saturation. I meticulously studied and methodically evaluated relevant artifacts, media, and marketing material to confirm the correctness of the description gained from the exhaustive online interviews. I tried to identify relevant themes from various sources by color-coding the data to identify and develop links between key issues and themes. I employed an iterative approach to reveal crucial information with precision. A systematic inquiry located data that precisely pertained to the primary research inquiry: "What strategies do small retail business leaders use to retain customers?" I employed NVivo 12 software, a software-based tool

for data analysis, for this study. Dhakal (2022) states that NVivo 12 software does not possess the capability to classify data into subjects and themes automatically.

NVivo provides a method for the researcher to visually examine the data and identify the significant elements within the common themes. Dhakal (2022) revealed that coding themes facilitate recognizing the interconnected experiences of individual participants in a research study. The software application analyzed unstructured text-based inquiries and transcripts of virtual interviews following participants' verification. Implementing NVivo 12 software was essential in enabling an efficient coding process for several data sources obtained from the collected data. The data was imported into NVivo 12 software from many data sources, utilizing the coding capabilities of the application to streamline the data analysis process. The data was categorized and grouped into themes during the procedure. NVivo 12 software scrutinized the data, employing diverse color schemes to accentuate the motifs and significant facets. Freitas et al. (2019) suggest that qualitative researchers utilize software applications to facilitate data analysis and identify categories, dimensions, and subcategories within their study. Freitas et al. (2019) acknowledged that software tools provide an efficient method for streamlining technical tasks associated with arranging results that do not significantly affect the study's main conclusion and necessitate minimum critical evaluation. The use of NVivo 12 software enabled the detection of connections and associations within the combined data. During the data collection phase, my focus was to examine and identify repeating patterns, create correlations between various subjects, and formulate solutions.

After data transcription was complete, I sent participants a one- to two-page summary of the findings for member checking to enhance the reliability and validity of the study's findings (see Candela, 2019). I analyzed the data collected from semistructured interviews through thematic analysis. Thematic analysis is a common approach that qualitative researchers use to analyze large amounts of verbal data (Lindgren et al., 2020). As Raskind et al. (2019) described, data analysis involves organizing the data into small meaningful units, called codes, to identify themes and patterns relevant to the research question. Specifically, I analyzed the interview transcripts using Braun and Clarke's (2019) method for thematic analysis, a six-phase guide. The six-step guide to data analysis allowed for the identification of codes, categories, and themes that can be used to answer the research question, as described below.

The first phase is familiarization with the data. In this phase, I transcribed the audio files into transcripts. I read each interview from start to finish to get an overall understanding of the data collected. This phase often involves multiple readings of the interview transcripts (Braun & Clarke, 2019). During this phase, I ensured that any personally identifiable information mentioned in the interview was redacted from the interview transcripts. The public company documents were also read from start to finish multiple times and sensitive information will be redacted.

During the second phase, I begin coding the data. This phase involves categorizing the data into meaningful units, also known as coding (Saldaña, 2021). I created a codebook that outlines the codes for categorizing the data. The codes were

descriptive phrases based on the participants' ideas and thoughts. NVivo Version 12 was used beginning in this phase. After all data was gathered, I transferred all papers, images, articles, and datasets, into NVivo. I also categorized the data based on the file names and coded the data by producing many codes that depended on the emergence of the data. I utilized the coding feature in NVivo by generating distinct codes to characterize the data, therefore choosing to manually code the data myself. Although I did not utilize the auto-coding function in NVivo, I employed the software as the main tool to code, analyze, and examine the data for themes and patterns. In addition, I utilized NVivo software to generate charts, idea maps, and word clouds, and execute queries based on the data. Consequently, I successfully identified patterns and established connections to address the research question. Throughout the process of coding and analyzing the data, I employed techniques such as cross-referencing and triangulation to ensure the accuracy of my findings. Employing NVivo assisted in validating the results and also provided a deeper understanding of the research topic. Moreover, NVivo allowed me to efficiently manage and organize a large amount of data, making it easier for me to track and analyze specific information. Both interview transcripts and company documents were coded during this phase.

Phase Three was the theme development phase. During this phase, I reviewed the coded data and extracted themes from the codes. Themes represent patterns and relationships between the data (Braun & Clarke, 2019). To extract themes, I grouped similar codes. I anticipate that some themes may be derived from General Systems Theory (GST). In Phase Four, I created a thematic map that details the connections

between the codes and themes. The thematic map is a visual representation of the data that helps researchers organize their data logically (Braun & Clarke, 2019). This approach allowed me to identify similarities and differences between themes.

During Phase Five, I examined the thematic map and determined whether any new themes emerged. Researchers rename and redefine the codes and themes during coding phase when necessary (Braun & Clarke, 2019). I redefined and renamed similar themes into a new encompassing theme to remove redundancy. In this phase, I addressed discrepant cases, or participants who express different ideas than the others. I identified and documented discrepant cases so I could discuss them in the research findings. In Phase Six, I evaluated the data and data analysis holistically. This procedure is done to ensure that the theme relates to the research topic. During this phase, I interpreted the data in the context of the study's theoretical framework, GST. Finally, after data analysis, I summarized each participant's data and performed member checking. This step enhanced the credibility and validity of the study's findings (Candela, 2019). The six-phased method for thematic analysis and member checking provided a robust analysis of the participants' data.

Triangulation is an important data analysis technique used in qualitative studies. The qualitative pragmatic inquiry research design relies on the convergence of multiple data sources to enhance the validity and reliability of the research study (R. Campbell et al., 2020b). Triangulation involves comparing information from multiple sources to determine if the information corroborates each other (R. Campbell et al., 2020a). Researchers use triangulation in qualitative research to minimize researcher bias, provide

richness to the data collection, and aid in reaching data saturation (R. Campbell et al., 2020a). Data triangulation involves the use of multiple sources of data (Farquhar et al., 2020; Natow, 2020), which is intrinsic to the multiple case study research design (Yin, 2018). In this study, I used data triangulation by evaluating data from multiple sources, including participants from different small retail businesses in the DMV region. Public documents also served as a means for triangulation of the interview data. Throughout the interview process a thematic method was employed to analyze notes and raw data representing participants' responses. Each theme identified in this study supported previous and current literature that aligned with the research question. For example, Salamah (2022) described the importance for employees to provide excellent service to help retain customers. An in-depth investigation validated the connectivity and interdependence of each theme on customer retention, which is further examined in the study. The interconnectivity of key components is integral to the entire process. A systems-oriented process could provide new insights that enhance performance, enabling richer and more comprehensive descriptions of the phenomenon (Jason & Bobak, 2023). The answers provided by each participant were examined using the general systems theory (GST) framework to discover similarities, disparities, and potential conflicts. The research produced four main themes: customer service, delivering high-quality goods and services, promoting corporate social responsibility, and employing social media as a means of customer retention.

Using a thematic method to identify and prioritize the most pertinent themes for customer retention, determined that the majority of participants recognized customer

service as crucial for retaining customers. The success of business expansion hinged on the caliber of high-quality service and products that resulted in customer satisfaction and promoted customer retention. Small retail business leader discovered that unforeseen circumstances might be resolved by utilizing social media to actively involve and educate clients about new products, services, as well as new locations and business hours. The utilization of social media to enhance customer retention has been proven as an effective resource in retaining customers (Bukhori et al., 2022). Each participant provided valuable perspectives on being involved in the community. All of the participants emphasized the significance of utilizing Corporate Social Responsibility to establish strong community partnerships that contribute positively to community initiatives, diversity, and inclusion in underserved communities, ultimately leading to beneficial transformations.

The interconnectedness of the fundamental themes supports the premise of Von Bertalanffy's, General Systems Theory, emphasizing the significance of each component as a unified system rather than as separate individual parts. Chowdhury et al. (2022) provided support for the holistic approach of the General Systems Theory GST conceptual framework. Chowdhury et al. (2022) acknowledge that GST can play a crucial role in developing comprehensive strategies that consider the overall impact of all elements on the entire system, rather than solely focusing on the contribution of individual components in retaining customers. Thompson et al. (2022) suggest that utilizing an iterative strategy while examining a phenomenon can lead to the identification of new and meaningful distinctions. Utilizing member checking facilitated the detection and rectification of any distortions in the participants' responses (Candela,

2019). In the end, during the conclusive stage, I examined the repetitive patterns in my interview data to ascertain consensus or divergence and juxtaposed my findings with existing and recent studies.

## **Reliability and Validity**

### **Reliability**

Reliability is an essential component of all research studies. In qualitative research, reliability refers to the soundness of the research pertaining to the methodology, research design, sampling method, and ways in which the data are analyzed (Vu, 2021). There are several strategies researchers can employ to improve the reliability, or dependability, of qualitative research, including: (a) identifying researcher biases, (b) reporting any preconceived assumptions or notions, (c) being rigorous in establishing the participants and methods, and (d) accurately reporting the information provided by the participants (Rose & Johnson, 2020). I used various methods, including extensive researcher reflexivity protocols, to enhance the reliability and dependability of the study.

Dependability is a method of establishing rigor and trustworthiness in qualitative studies that relies on rigorous data collection and analysis protocols. In this study, I promoted the dependability of my findings in the following ways. First, I documented my research protocol in my research log to provide rigor in the establishment of the participants and research methods. Second, I kept a reflexivity journal to note any preconceived notions, thoughts, and perceptions at each stage of the research process, following the guidance of McGrath et al. (2021). Third, I employed member checking (see Candela, 2019) to allow the participants to review the transcripts and data summary



for errors and confirm my data interpretation. These choices enhanced the dependability of the study's findings.

### **Validity**

Qualitative researchers achieve validity, or credibility of multiple sources of evidence and establishing a chain of evidence. Rose and Johnson (2020) noted that qualitative researchers improve the validity of their findings through data triangulation and data saturation. According to containing a summary of key points and validity, or transferability, by evaluating multiple cases, triangulating findings, and comparing findings to those in the academic literature. The validity of a qualitative study is assessed through credibility, transferability, and confirmability.

### ***Credibility***

Credibility refers to the believability of a research study. According to Wood et al. (2020), credibility involves the level of confidence that readers can have in the study's conclusions. I ensured credibility in multiple ways. First, I used multiple data sources, combining data from the interview findings and documentary evidence from public records. This allowed me to provide a rich, thick description of the data and ensure data saturation (Rose & Johnson, 2020). I also kept a reflexive journal throughout the research process to document my perceptions related to the research process, following the guidelines of McGrath et al. (2021). I also used member checking to ensure the accuracy of the information presented in the research findings.

### ***Transferability***

Transferability is similar to the concept of generalizability in quantitative studies. Specifically, transferability refers to the ability to generalize the research findings to other cases with similar individuals (Rose & Johnson, 2020). Transferability also refers to the extent to which other researchers can use and apply the study results beyond the boundaries of the initial population under investigation (Maxwell, 2021). To address transferability, I rigorously documented my data collection and analysis methods, providing a detailed description of the interview protocol, case study, participants, and research findings. According to R. Campbell et al. (2020b), the purposeful sampling technique can also enhance the transferability of a study's findings. I addressed transferability by ensuring that the purposefully selected participants interviewed in the study were diverse and representative of the study's general population.

### ***Confirmability***

Confirmability refers to the extent to which other researchers can replicate the research findings. The confirmability of a study can be enhanced by rigorously documenting the study's anticipated and actual methodology (Halkias et al., 2022). To confirm my study's accuracy, I used an interview protocol for the semistructured interviews. Using an interview protocol ensures that researchers ask each participant the same questions. The interview protocol in the appendix will allow other researchers to replicate my interviews. I accurately documented the interview transcripts and performed member checking to verify the integrity of the data collected and its interpretation (see

Candela, 2019). To minimize researcher bias, I used reflexivity protocols, including journaling, to document my perceptions as a researcher.

### ***Data Saturation***

Data saturation is important for confirmability. Data saturation is when no new information will be gained by interviewing more participants (R. Campbell et al., 2020b). Once saturation has been reached, data collection is thought to be exhausted (R. Campbell et al., 2020b). To achieve data saturation, I interviewed as many small retail business leaders as needed until no new data or coding emerged. I used multiple sources that included public business documents, social media platforms and marketing materials to gather diverse information until the no new data were identified indicating data saturation was reached.

### **Transition and Summary**

In Section 2, I restated the purpose of the study and discussed my role as a researcher. I reported the participant selection criteria, recruitment strategy, research methodology, and design. I identified the population, sample, and sampling technique and discussed ethical research principles applicable to this study. I described procedures for participation, data collection, and data analysis. I also discussed the procedures I will use to ensure the reliability and validity of the study. In Section 3, I will present the research findings, applications for professional practice, and recommendations for future research.

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

#### **Introduction**

The purpose of the qualitative pragmatic inquiry was to explore successful strategies that some U.S. small business leaders use to improve customer retention. The theoretical foundation was GST. I interviewed 10 U.S. small retail business leaders in the District of Columbia, Maryland, and Virginia, who used successful customer retention strategies. The participants provided the primary data used to answer the research question, and secondary data sources included public documents and documents provided by the small retail business leaders regarding customer interaction and retention. Interviews were performed until data saturation was reached, as evidenced by the generation of no new information from the interviews or document review.

The participants discussed strategies they used to successfully retain customers successfully. Based on the participants' responses to the interview questions, I identified four themes. The first theme was providing good customer service. The second theme was ensuring customers were provided with good quality products or services. The third theme was using social media to interact with customers and for marketing. The fourth theme was ensuring corporate social responsibility. By relating the study's findings to GST, I better understood some U.S. small retail business leaders' strategies to improve customer retention. The study's findings illustrate that some U.S. small retail business leaders use multifaceted customer retention strategies.

## Presentation of the Findings

The overarching research question guiding this study was as follows: “What strategies do some U.S. small retail business leaders use to retain customers?” Most small retail businesses fail within their first 5 years in business (Kalogiannidis, 2020).

Customer retention strategies can help mitigate small retail business failure (Hawkins & Hoon, 2022). The literature suggests that small retail businesses are more prone to customer attrition than larger enterprises, especially in light of the COVID-19 pandemic (Crane et al., 2022). Small retail business leaders who lack effective customer retention strategies could lose profitability if customers seek products or services from other organizations. I used triangulation to combine data collected from semistructured interviews and company documents. Upon completing my eighth interview, no new codes were generated, indicating that I had reached data saturation. I conducted an additional two interviews to ensure that data saturation had been reached.

I organized the study’s data and conducted a thematic analysis using the NVivo Version 12 software to identify emerging themes and trends for the data analysis and interpretation. Four themes were identified based on the participants’ responses to the interview questions. Table 2 details the organization of the study’s themes and gives an example excerpt from a participant’s interview.

**Table 2***Themes Identified in This Study*

Theme	Theme Name	Participants	Sample excerpt from interview
1	Good customer service promotes customer retention	All participants	“Building a good, trusting rapport with your clients that keeps bringing them back” (L3).
2	Good quality products and services promotes customer retention	L1, L2, L3, L4, L7 L10	“I tend to put a lot of emphasis on just trying to do the job the correctly” (L4).
3	Using social media to interact with customers and for marketing	L1, L2, L5, L6, L9, L10	“Social media is a very large part of retaining my customers because I can reach more people” (L5).
4	Corporate social responsibility helps retain customers	L1, L3, L6, L7, L8, L10	“Customers will remain with businesses that invest in them as people and in their communities” (L10).

Table 2 shows the number of participants that contributed to each theme. For this study, a pattern in the data was considered a theme if at least six participants shared the idea. The first theme identified was providing good customer service. The second theme involves providing customers with high-quality products and services. The third theme was using social media to interact with customers and for marketing. The fourth theme involved corporate social responsibility.

### **Theme 1: Good Customer Service Promotes Customer Retention**

The small retail business leaders interviewed in this study described using good customer service to promote customer retention. Four codes were used to develop this theme: good customer service, understanding customer needs, addressing weaknesses, and employee training for customer service. These descriptors represent how the participants described using customer service to promote customer retention. I provide examples of these ideas in Table 3.

**Table 3***Codes Contributing to the Development of Theme 1*

Strategy	Participants	No. of References	Excerpt from interview
Good customer service	L1, L2, L3, L4, L5, L7, L10	17	“Giving good customer service is my most valued asset” (L7).
Understanding customer needs	L1, L2, L6, L9, L10	8	“Customer retention starts with understanding customer needs” (L10).
Addressing weaknesses	L2, L3, L4, L5, L10	9	“We took into consideration all of the critical, constructive criticism that we got because it allowed me to know what we needed to fix” (L3).
Employee training for customer service	L2, L3, L8, L10	5	“The strategies and the techniques that we use are to be consistent in constantly training and doing customer service training to also be very hands-on with the employees” (L3).

*Note:* Leader pseudonyms are abbreviated for clarity. For example, L1 corresponds to Leader 1.

The multifaceted nature of the participants’ customer retention strategies through customer service is well suited for analysis under GST, the study’s chosen conceptual framework. Each customer service strategy elucidated by the participants is described in the findings below.

***Good Customer Service***

The participants spoke about good customer service in general, as well as specifically. In this subtheme, I analyzed the participants responses about customer service in general. Seven participants contributed to this subtheme. Leader 1 spoke about how they use customer service to improve customer retention. Leader 1 said, “Strategies we use are our excellent customer service. Our standard for our company is our level of professionalism. Our deal is providing outstanding customer service [and] outstanding services to our customers. And that’s how we retain.” Leader 1 explained that their level

of professionalism regarding customer service allowed them to retain customers. Leader 10 concurred with Leader 1, saying:

We run a business that is largely dependent on new customers because we run an independent test prep company. If we do our job right, the students pass their exams and don't require us again. However, sometimes, students need more time than one cycle with an exam. We almost always get those students back, even though they didn't pass their exams. Why? Because we're professional, we guide them and give them excellent customer service in terms of honest feedback about their progress and trajectories.

Leader 10 also expressed that their company's level of professionalism with customer service helped retain customers even in a business that isn't designed for customer retention.

Leader 2 explained that customer retention occurs through customer service involving genuine care and concern. Leader 2 explained, "A client, at the end of the day, will gravitate to those who can help them, and so, we try to be of service first and help. We express sincere concern and that helps us retain customers." Leader 2 finds that customer service involves sincere concern; when customers are treated with respect, and their concerns are addressed, they will remain with the company. Leader 7 also spoke about respect as an essential component of customer retention. Leader 7 said, "We make sure our customers feel respected throughout the customer service process. That really helps them make the decision to stay with us." For Leaders 2 and 7, respect is an essential component of customer service. They argued that showing respect for customers



throughout the customer service experience influenced customers' decisions to remain with their companies.

Leader 3 spoke about a convergence of the ideas conceptualized by Leaders 1, 2, 7, and 10. Leader 3 believed that excellent customer service promoted retention and contained elements of respect, trust, and comfort. Leader 3 said:

The best strategy is being able to provide excellent customer service to have repeat clients' return. My role in the customer service that we provide is keeping customers comfortable, trusting, and coming back. Building a good, trusting rapport with your clients that keeps bringing them back.

Leader 3 emphasized the need to build a strong rapport with clients, to allow them to trust the company, which facilitates their decision to return to the company. These participants expressed the need for good customer service to retain customers.

### ***Understanding Customer Needs***

The participants believed that an essential component of customer service is understanding customer needs. Leader 10 explained that understanding customer needs is a necessary first step to providing excellent customer service. Leader 10 said, "You can't have good customer service if you don't know what the customer is looking for.

Understanding customer needs is essential. It's the first thing I try to understand so I can give them the service they want." Leader 10 stated that understanding customer needs is "essential" regarding customer service. Leader 9 expanded on this idea, giving a concrete mechanism for understanding customer needs. Leader 9 said, "We do an entry survey asking the customers to identify their needs. We use those surveys to ensure our customer

service is consistent with their needs. That keeps them coming back.” Leader 9 believed that customizing their customer service experience to individual customers allowed them to retain customers. Leader 6 concurred with Leaders 9 and 10, further explaining that “customers who get individualized customer service feel special and valued. That’s how we retain customers.” For these participants, customizing the customer service experience to their individual needs is important for retaining customers.

Leaders 1 and 2 also spoke to this theme, emphasizing that individualized consideration of customers’ needs promotes retention. Leader 1 described:

It’s based on understanding the needs of our customers and then the needs of our customers vary. However, by using social media as a tool, we’re able to communicate more effectively with our customers. Understanding and being able to understand what it is that they like. And so, we can cater to them more specifically on an individual basis. This builds retention.

Leader 1 described using social media to customize the customer service experience. Specifically, Leader 1 used social media as a tool to individualize customer service to individual customers. Leader 2 further explained, “You’re bringing [customers] from stage to stage by investigating what their pain points are. You streamline based on the needs of your client. That’s the strategy.” Leader 2 expressed the same idea in a similar way. By investigating customers’ “pain points,” Leader 2 is explaining that their company strives to understand each customer’s unique needs. By doing so, Leader 2 customizes their firm’s customer service to individual customers. The participants’ creativity and innovative methods emphasized the importance of using creative and

innovative approaches to fulfill the needs, demands, and expectations of customers in order to promote customer retention.

### *Addressing Weaknesses*

Multiple leaders spoke about the necessity of addressing weaknesses as an essential component of customer service that promotes retention. Leader 5 discussed how addressing a company's weaknesses or shortcomings in customer service can make a customer feel valued. Leader 5 said, "Getting negative feedback is never fun, but we use it to grow. We address customers' concerns, and that helps them feel valued, which keeps them returning. They value a company that values their feedback." Leader 5 believed that responding to negative reviews can increase retention by showing customers that their feedback is important. This point was echoed by Leader 4, who said, "Customer retention is ensuring that we address concerns in a timely manner, showing the customer that their opinions matter." Like Leader 5, Leader 4 believed that addressing customer concerns can promote retention by showing customers they are valued.

For Leader 2, addressing negative customer feedback is valued from a business perspective. Leader 2 explained:

We want to know, as well, if there was any disappointment in place, if there was any dissatisfaction, and if they were not satisfied with something; that is very important to us. I would say that it is more important than just knowing that we did a good job. We aim to do a good job, but when someone can point out and help you understand your weaknesses, and allow you to turn those into a strength, we value that very much.

For Leader 2, customer feedback can be viewed as a means for improvement if there are areas of weakness. Leader 2 leverages negative feedback from customers to learn how to provide better services, which is another theme that emerged from this study (Theme 2). Leader 3 also spoke about using customer feedback to grow and make progress. Leader 3 said:

In the growing pains of starting, we took into consideration all of the critical, constructive criticism that we got because it allowed me to know what we needed to fix, and we acted upon those responses and made the necessary changes. I believe it helped retention by sending the right message to customers.

While Leader 2 did not speak about how addressing negative feedback influenced customer retention, Leader 3 believed that addressing weaknesses functioned to increase retention because the changes were visible to customers. The customers who voiced concerns could see their concerns being addressed, which Leader 3 believed promoted retention. For these participants, addressing weaknesses exposed by customer concerns helped promote retention.

### ***Employee Training in Customer Service***

The final code contributing to the development of Theme 1 is *employee training in customer service*. Four participants spoke about employee training regarding customer service as a customer retention strategy. Leader 10 spoke about employee training, saying, “We make sure our employees are trained in customer service. The employees interact directly with the students and will be the first ones to address concerns. Without proper training, I believe our retention would be worse.” Leader 10 believed in training

their employees in customer service, ensuring that they facilitate good customer interactions and building retention. Leader 2 also believed employee training was critical to customer service and retention. Leader 2 said, “Our employees get trained in customer service to make sure that the customers have a pleasant experience. I believe employee training is critical for customer retention.” Leader 2 emphasized that employee training is necessary for customer retention because employees are directly working with customers to ensure they have a favorable experience. These leaders emphasized the need for employee training to facilitate customer retention. The documents examined included training manuals, websites, event fliers, and pamphlets were documents available, that corroborated the customer retention tactics, some small retail business leaders employed to retain customers. Each publicly available document offered insight into some small retail business leader’s customer retention strategies that assisted in identifying the four main themes. As an illustration, consider the new website that one small retail business leader created and discovered as a resource to educate customers about newly available goods and services. The recently developed website confirmed that using social media could lead to customer retention and product and service promotion.

### ***Comparison of Theme 1 to the Academic Literature***

The first theme identified in this study revolves around implementing good customer service practices to enhance customer retention in small retail businesses. The literature echoes the significance of customer satisfaction in fostering customer retention. Sohail et al. (2023) emphasized that customer satisfaction is rooted in comparing customer expectations and the actual product or service received. The results of the study

indicate that customer satisfaction influences repurchase behavior and retention. This aligns with the findings in the current study, where small retail business leaders described using good customer service to promote customer retention, suggesting that customer satisfaction influences business success regarding customer retention. An enjoyable and interactive customer experience not only pleases the consumer but also achieves customer retention. Gu et al. (2023) asserted that during challenging times, business leaders can depend on the contentment and loyalty of their customers to endure and thrive in the new setting.

Small retail business leaders who adapt strategies to keep customers satisfied will retain customers by establishing a correlation between meeting customer demands, satisfaction, and repeat purchases. Ahmed (2023) and Pachuau and Kumar (2023) purported that meeting customer demands is even more critical in small businesses than larger companies because customer satisfaction and retention can create necessary revenue stream that persist during turbulent economic periods. The research demonstrated that satisfied customers are more likely to make repeat purchases from a business, reinforcing that customer satisfaction is a critical factor in customer retention. This aligns with the strategy outlined in this study, where participants emphasized the importance of addressing weaknesses and understanding customer needs to ensure a positive customer experience.

### ***Analysis of Theme 1 Under GST***

GST emphasizes the interconnectedness of components within a system and posits that systems are self-regulating and self-correcting (de Zeeuw, 2021; von

Bertalanffy, 1968). Applying GST to the analysis of the first theme, centered around good customer service, provides a holistic perspective, considering the business as an integrated system rather than a collection of isolated elements. Customer service, viewed through a GST lens, involves considering the interconnected relationships between businesses, customers, and competitors. Hawkins and Hoon (2019) found that relationship management and customer satisfaction, critical elements in customer retention, align with the principles of GST. Chowdhury (2023) also found flexibility in systems thinking that indicated principles of GST are dynamic and can change as customer needs change. When viewed through the lens of GST, these strategies align with the principles of interconnectedness and systemic thinking, emphasizing the need for small retail business leaders to consider the breadth of customer needs.

## **Theme 2: Good Quality Products and Services Promotes Customer Retention**

The second theme identified in this study is good quality products and services. The participants believed that providing good quality products and services helps enhance customer retention. Leader 1 emphasized the necessity of providing services of high quality to customers. Leader 1 said:

The product that we provide, we make sure that it's top of the line. Everyone wants the best out of whatever situation is or the best bang for the buck. And so, by providing high-quality service, customers will naturally gravitate because everyone wants a deal.

Leader 1 observed that customers would return if they were provided with high-quality products that were priced reasonably. Leader 2 explained that providing services and

products was in consistent flux. Leader 2 said, “We are constantly updating our understanding and refreshing our product information as the economic terrain fluctuates and changes.” Leader 2 acknowledged that their firm must change their products and services as the “economic terrain” of their small business changes. Leader 3 also believed their firm would retain customers when it could “provide services with little to no errors.” These leaders emphasize that providing high-quality products and services ensures customers want to return for additional products and services.

Other participants spoke directly about good quality products and services and customer retention. Leader 10 said:

We’re a service-based business. We teach students material to help them get into medical school. Without high-quality teaching, students won’t stay for the entire course, and we would have no chance of retaining them for a second course.

Leader 10 works in a service-based industry, noting that customer retention is directly tied to the quality of their service. Leader 8 concurred with Leader 10, saying, “90% of our work is dependent on the quality of the service. So, once you give them 100%, people always come back because of the quality of your product.” Leaders 8 and 10 believed that customer retention was directly linked to the quality of products and services.

### ***Comparison of Theme 2 to the Academic Literature***

The second theme identified in this study focuses on offering good quality products or services to enhance customer retention in small retail businesses. Theme 2 aligns with existing customer satisfaction literature, including literature examining post-purchase behavior and the challenges posed by online platforms and showrooming. The



advent of e-commerce has exerted a substantial influence on conventional brick-and-mortar retail establishments, resulting in a decline in the number of customers visiting physical stores, a reduction in sales, and heightened competition from digital merchants (Mahmood, 2023). Ismail (2023) found that small businesses that provided high quality services with meaningful and unique customer engagement were able to increase customer retention online and in brick-and-mortar retail establishments. Customer retention strategies are imperative in the context of small retail businesses. One prevalent challenge in the retail landscape is showrooming, where customers compare products or services across different retailers, online or brick-and-mortar stores (Hsieh: et al., 2023). The showrooming, mainly driven by noticeable price disparities and the convenience of online purchases, threatens customer retention (Frasquet et al., 2023).

However, researchers emphasized the need for small business retail leaders to understand the factors contributing to showrooming and to develop strategies that counter the threats posed by online retail businesses (Guo et al., 2022; Viejo-Fernández et al., 2020).

In response to showrooming challenges, researchers suggest that personalized customer experiences and exceptional in-store service can effectively mitigate the threat and increase customer retention (Mahmood, 2023). By offering a tailored and memorable shopping experience, small business retailers can foster a sense of loyalty and engagement that transcends the convenience and price advantages offered by online and large retailers. High-quality products or services align with the broader efforts to highlight showrooming for small retail businesses. High-quality offerings contribute to

customer satisfaction and serve as a competitive edge, making it less likely for customers to seek alternatives.

### *Analysis of Theme 2 Under GST*

Theme 2 can be analyzed using GST as a theoretical lens. GST emphasizes the interconnectedness and interdependence of system elements while viewing a system as a self-regulating and self-correcting entity (Spain, 2022; von Bertalanffy, 1968). Analyzing Theme 2 within the GST framework involves considering how the quality of products or services influences the overall system dynamics and contributes to customer retention. In GST, a system consists of interconnected units, continuous interconnectivity, and an analysis that provides an understanding of interconnected systems (Sharif et al., 2023; von Bertalanffy, 1972). The quality of products or services is a fundamental system unit within the small retail business system. The quality of products or services becomes a crucial factor in the interaction between the business and its external environment, influencing customers' perceptions and responses (von Bertalanffy, 1972). By understanding the interconnected relationships and adopting a holistic approach, small business leaders can develop effective strategies that enhance customer satisfaction and contribute to the overall resilience and success of the business within its dynamic environment (Mossberger et al., 2023). Applying GST facilitates a nuanced understanding of how product and service quality contribute to the complex web of interactions within a small retail business system.

### **Theme 3: Using Social Media to Interact with Customers and for Marketing**

The third theme identified in this study is using social media to interact with customers and for marketing purposes. The participants believed using social media was optimal for interacting with customers and promoting customer retention. Leader 1 believes that social media promotes customer retention. Leader 1 said:

Because of the real-time interaction with social media and our clients, we're able to create the atmosphere of being involved in touch. If you're in one [social media group], [you're] always connected. This keeps customers coming back because they think you value their time.

Leader 1 believed that social media allows for customer interaction in a time-sensitive manner. Timely responses ensure that customers feel valued, which promotes customer retention. Leader 5 also believed that social media was critical for customer retention, saying, "Social media is a very large part of retaining my customers because I can reach more people. Normally, the word gets passed by way of social media much faster than by way of email, personal landline, or text messages." Leader 5 believed that social media marketing allowed for more customers to be reached, increasing the chance that customers would be retained. Leader 6 uses social media to stay connected with current customers. Leader 6 said, "It's about getting them involved and keeping them actively involved through social media. Keep them my customers coming back." Leader 6 operates a wine business and engages customers with new products and offerings through social media. Leaders 1, 5, and 6 believe that using social media to engage with customers is a mechanism for increasing customer retention.

Three leaders spoke explicitly about the relationship between customer retention and using social media for marketing. Leader 10 said, “I’m relatively new to social media, but we started marketing our services to current customers, asking them if they need additional services.” Leader 10 uses social media to market specifically to current customers, connecting customers with new services through social media platforms. Leader 1 also used social media marketing, saying, “We market on social media. It’s easy to customize your marketing to new customers, current customers, and old customers. We use it as a tool to engage or reengage with customers and retain them.” Leader 10 used social media to target different groups of customers, including previous and current customers, to increase customer retention. These findings indicate that social media can be used as a tool to engage with customers and increase customer retention.

### ***Comparison of Theme 3 to the Academic Literature***

Theme 3 aligns with literature that emphasizes the importance of technology, personalized experiences, and effective marketing strategies in the context of small retail businesses. For example, the increasing importance of technology for small retail businesses is a recurring theme in the literature (Ahmed et al., 2022; Nuseir et al., 2023). Customers now expect user-friendly websites and mobile applications that provide seamless shopping experiences alongside personalized interactions achieved through data-driven insights (Cunningham & De Meyer-Heydenrych, 2021). Mobile applications and social media can enhance the customer experience and contribute to customer retention (Attar et al., 2023).

Small retail business leaders are encouraged to leverage technology and data analytics to personalize offerings and enhance the overall customer experience. This aligns with using social media for customer interaction, as social media platforms offer a space for personalized engagement and communication (Pellegrino et al., 2023). Social media, one of the fastest-growing technologies, offers small retail businesses a powerful tool to establish crucial business insights (Pellegrino et al., 2023). The immediacy of social media platforms can create expectations of instant access to business personnel, which may not always align with the actual availability of small retail business employees (Pellegrino et al., 2023). Hence, small retail business leaders may manage customer expectations by communicating their online service availability on social media.

### ***Analysis of Theme 3 Under GST***

Theme 3 can be analyzed using GST as a theoretical lens. Within the GST framework, a system comprises interconnected units, continuous interconnectivity, and an analysis providing an understanding of interconnected systems (von Bertalanffy, 1972). The use of social media can be viewed as a dynamic system unit within the small retail business system. Social media can allow business leaders to interact with micro communities of customers (Appel et al., 2020). Expressly, social media platforms represent a space for continuous interconnectivity, where the business interacts with customers and the external environment in real-time (Attar et al., 2023).

In GST, systems are considered resilient when they can adapt and learn from their environment (Van Assche et al., 2019). As a dynamic tool for customer interaction and

marketing, social media can enhance a small retail business' resilience by facilitating real-time adaptation to customer needs, market trends, and feedback (Westman et al., 2023). This adaptability contributes to the long-term sustainability and success of the business within a dynamic environment (von Bertalanffy, 1972). Within the GST framework, social media serves as a platform for building and maintaining customer relationships in static or dynamic environments (Westman et al., 2023).

#### **Theme 4: Corporate Social Responsibility Helps Retain Customers**

The fourth theme identified that increases customer retention is corporate social responsibility. The participants spoke about how social responsibility was important for customers when considering whether to continue doing business with a company. Leader 1 explained, "We do a lot of work with the community to build the community. That's important to customers who are members of the community. Customers stay with companies that support other aspects of their lives." Leader 1 explained that customers are more likely to choose to do repeat business with companies that support their communities. Consequently, they emphasize good corporate social responsibility. Leader 3 also explained the necessity of good corporate social responsibility. Leader 3 described:

We have decided that we're going to support some of our client-based businesses through the nonprofit organization because I work with a lot of clients that are community-based programs that provide services to clients in the community. We decided that we would start pulling clients that we will support or sponsor and provide support to their businesses from our business. Showing customers, we value their businesses is a way to keep them with our business.

Leader 3 explained that they invest in their clients' businesses to promote community investment, which emphasizes that clients are valued. Through these practices, Leaders 1 and 3 increase customer retention. Leader 7 also spoke about corporate responsibility, saying, "I think that social responsibility on the part of the organization can keep customers engaged. If you show customers you're interested in them as people, they'll stay." Leader 7 believed that social responsibility shows customers they're more than customers. They're valued community members. Leader 6 echoed the comments of Leader 7, saying:

I think almost everyone, almost everyone can appreciate genuineness, genuine good, and kindness. And so, we cater to that; we provide that because that is what we would like to see in our communities, being that we're community oriented. We provide what we want to see in our community. We are about community; we're about calling ourselves a family. And we let that radiate. The customers come back.

Leaders 6 and 7 believed that investing in customers as people makes customers an integral part of their businesses and their communities. They believed that family and community orientation, in turn, increases customer retention. These findings indicate that small retail business leaders can increase customer retention through corporate social responsibility.

#### ***Comparison of Theme 4 to the Academic Literature***

This theme aligns with a growing body of literature that explores the impact of corporate social responsibility (CSR) on various stakeholders and the overall

performance of companies. CSR involves corporate actions to *do good* for stakeholders, including consumers, employees, and communities (Banerjee, 2008). Researchers identified several factors influencing CSR performance, such as market competition (Leong & Yang, 2021) and firm maturity (Withisuphakorn & Jiraporn, 2016). This suggests that while CSR is a commendable goal, financial considerations shape the extent companies can engage in socially responsible practices. Mukhtaruddin et al. (2019) investigated the relationship between corporate governance, CSR, firm value, and financial performance. Their study focused on the banking sector listed on the Indonesia Stock Exchange, revealing that corporate governance and CSR can positively influence firm value. Berniak-Wozny et al. (2023) found that CSR not only increased the value of small and medium-sized businesses but also increased employee satisfaction which led to additional customer retention because of improved customer service.

While CSR is generally associated with positive outcomes, financial constraints may pose challenges, underscoring the need for a balanced approach. The study by Mukhtaruddin et al. (2019) highlighted the nuanced relationship between corporate governance, CSR, and firm value. In the context of small retail businesses, the positive impact of CSR on customer perception, employee morale, and community engagement needs to be complemented by sound financial performance to enhance overall firm value (Putz et al., 2023). Understanding the complexities and potential constraints highlighted in the literature can guide small retail business leaders in formulating and implementing CSR strategies (Adewole, 2024).



### *Analysis of Theme 4 Under GST*

Analyzing Strategy 4 within the GST framework involves considering how CSR initiatives influence the overall system dynamics, stakeholder interactions, and the sustainability of small retail businesses. In the context of GST, a system comprises interconnected units, and CSR initiatives can be seen as integral units within the small retail business system (von Bertalanffy, 1972). The actions and initiatives undertaken in the realm of CSR create interconnections with various stakeholders, including consumers, employees, and the community (Stock et al., 2023). CSR is dynamic and is impacted by other business components. GST emphasizes continuous interconnectivity within a system (von Bertalanffy, 1972). When viewed through the lens of GST, CSR practices represent an ongoing and interactive relationship with stakeholders. Adopting CSR practices involves using a holistic approach to stakeholder well-being, which is in line with GST. CSR initiatives encompass the broader impact of an enterprise on employees, customers, and the community (Singh & Misra, 2022). This holistic perspective aligns with the principles of GST, emphasizing the interconnectedness of various components for the overall well-being of the system.

### **Applications to Professional Practice**

The findings, organized into four key strategies, have direct implications for improving business practices and addressing the challenges small retail enterprises face. The first identified strategy involved optimizing customer service. Small retail business leaders can provide superior customer service by emphasizing the importance of customer-centric practices within their organizations. Training programs and guidelines

for staff could be developed to ensure consistent and exceptional customer service. The second strategy highlights the significance of offering high-quality products and services. Small retail business leaders can enhance their professional practices by investing in product quality, rigorous quality control processes, and continuous improvement initiatives.

The third strategy underscores the role of social media in customer interaction and marketing. Business leaders can adopt a strategic approach to social media, recognizing social media platforms as interconnected subsystems within the larger customer engagement system. Small retail businesses can use data-driven insights and personalized communication to enhance their social media presence, fostering stronger customer relationships and effectively marketing their products or services. The fourth strategy emphasizes the importance of corporate social responsibility. Small retail business leaders can integrate CSR practices into their professional strategies, recognizing CSR as a dynamic element within the organizational system. By applying the study's findings to professional practice, small retail business leaders can enhance their customer retention strategies and navigate the challenges inherent in the industry.

### **Implications for Social Change**

The findings of this qualitative pragmatic inquiry, centered on successful customer retention strategies employed by U.S. small retail business leaders, have implications for social change. The identified strategies, grounded in GST, extend beyond individual businesses, and have the potential to contribute to positive transformations within communities, organizations, institutions, and society at large. By implementing the

following customer retention strategies, small retail businesses have the potential to become agents of positive change within their communities and beyond.

### **Empowering Local Communities**

The strategies I revealed in this study, such as emphasizing good customer service and engaging in corporate social responsibility, hold the potential to empower local communities. Small retail businesses are often integral parts of communities, and by prioritizing customer satisfaction and contributing to social causes, these businesses can become catalysts for positive change. Specifically, enhanced customer loyalty can lead to increased patronage within the community, fostering economic growth and sustainability.

### **Strengthening Small Business Ecosystems**

Small retail businesses play a vital role in the economic fabric of communities. Therefore, implementing the identified strategies can strengthen the overall small business ecosystem. As these businesses adopt customer-centric practices, leverage social media for marketing, and embrace corporate social responsibility, the collective impact can result in a more resilient and interconnected small business community (Kalogiannidis, 2020). Enhancing small retail business profits can positively affect local community ecosystems by increasing tax revenue and providing additional job opportunities.

### **Influencing Organizational Cultures**

At the organizational level, the strategies identified in the study can influence the cultures of small retail businesses. The emphasis on quality products, exceptional customer service, and corporate social responsibility can shape organizational values and

norms. By aligning practices with GST principles, leaders can foster cultures prioritizing customer satisfaction, social responsibility, and continuous improvement (Jackson, 2019). Small retail business leaders who implement effective customer satisfaction and demonstrate social responsibility tend to foster a culture of successful customer retention.

### **Shaping Consumer Expectations**

The insights I garnered from this study can contribute to shaping consumer expectations and behaviors. As small retail businesses adopt multifaceted customer retention strategies, consumers may expect a higher standard of service, product quality, and corporate social responsibility. Specifically, shifting customer expectations can drive positive changes in the larger retail industry, promoting ethical and customer-centric practices (Sohail et al., 2023). Customer expectations are fluid. To attract customers, small retail business leaders should consistently reassess and adjust their strategies to align with customer expectations and industry developments.

### **Informing Policy and Institutional Changes**

The implications extend to the institutional and policy levels. Through the findings of the study, successful customer retention strategies are crucial for the sustainability of small retail businesses, especially in challenging economic environments. Policymakers and institutions supporting small businesses may find value in promoting initiatives that encourage the adoption of these strategies. This could include providing resources, training programs, and incentives to help small retail businesses enhance their customer retention practices (Crane et al., 2022). Effective

customer retention strategies foster a competitive industry advantage. Having a knowledgeable and well-trained staff improves customer retention.

### **Contributing to Societal Well-being**

Beyond economic considerations, the study's implications have broader implications for societal well-being. For example, positive relationships between small retail businesses and their customers promote connectedness and mutual support. Social cohesion contributes to community members' overall well-being, creating environments where businesses thrive, individuals feel valued, and communities flourish (Chowdhury et al., 2022). Small retail business leaders can contribute to societal well-being by enhancing customer retention.

### **Recommendations for Action**

The insights I gained from this qualitative pragmatic inquiry provide actionable recommendations for small retail business leaders and key stakeholders aiming to enhance customer retention strategies. By implementing these recommendations, small retail businesses can enhance customer retention efforts, contribute to positive organizational cultures, and foster sustainable relationships with customers and communities.

### **Adopt a Multifaceted Approach to Customer Retention**

Small retail business leaders can enhance customer retention by using different strategies, as shown by the multiple themes identified in this study. Leaders are advised to adopt a multifaceted approach to strengthen customer retention in small retail businesses (Kolar et al., 2019). Recognizing the interconnected nature of customer

retention, small retail business leaders should implement diverse strategies. This includes elements such as prioritizing good customer service, offering high-quality products, engaging with customers through social media, integrating corporate social responsibility initiatives, and employing effective communication techniques. A customized approach ensures a comprehensive and targeted strategy that addresses their customer base's specific needs and preferences, ultimately enhancing overall customer retention efforts.

### **Prioritize Employee Training for Customer-Centric Practices**

A pivotal strategy in elevating customer retention efforts within small retail businesses involves prioritizing employee training for customer-centric practices. Acknowledging the paramount role of employees in delivering exceptional customer service, businesses must invest in training programs that enhance essential soft skills (Kolar et al., 2019). This includes fostering attributes such as empathy, effective communication, and problem-solving, ensuring positive interactions between employees and customers (Meilatinova, 2021). Additionally, aligning employee goals with customer satisfaction metrics is crucial for reinforcing a customer-centric culture within the organization (Santos & Schlesinger, 2021).

### **Facilitate Knowledge Sharing through Industry Networks**

To enhance customer retention strategies in small retail businesses, a key recommendation involves facilitating knowledge sharing through industry networks. Industry associations and professional networks typically create platforms for small retail business leaders to share successful customer retention strategies. These platforms can be seminars, webinars, or discussion forums that provide opportunities for leaders to engage

in meaningful knowledge exchange and collaborative learning (Kolar et al., 2019).

Professional networks should emphasize showcasing case studies and success stories from small retail businesses that have excelled in customer retention (Van Assche et al., 2019). The findings of this study could improve small retail business leaders' knowledge of successful customer retention strategies.

### **Integrate Customer Retention Principles in Business Education**

A pivotal recommendation to enhance customer retention efforts in small retail businesses is the integration of customer retention principles into business education. Academic institutions play a central role in achieving this by incorporating customer retention concepts into their business curricula (Vanderstraeten, 2019). This integration involves equipping future business leaders with the necessary knowledge and skills for effective customer relationship management through coursework and practical exercises (Van Assche et al., 2019). This collaboration allows academic institutions to stay abreast of industry trends and best practices, providing students with relevant and up-to-date insights into customer retention strategies that can be applied in their future roles as business leaders.

### **Utilize Online Platforms for Knowledge Dissemination**

In advancing customer retention efforts for small retail businesses, a strategic recommendation involves the utilization of online platforms for knowledge dissemination. Small retail business leaders and stakeholders can leverage digital platforms to share insights and best practices in customer retention (Askar et al., 2022). Additionally, creating accessible content, such as webinars, podcasts, or blog posts,

effectively summarizes key findings and offers practical tips for enhancing customer retention strategies (Askar et al., 2022). The overall use of social media for promptly communicating with large customer audiences can promote customer engagement and retention. Social media is valuable for informing customers about new products and services. Small retail business leaders can use social media platforms to promote customer loyalty and retention.

### **Recommendations for Further Research**

The findings of this qualitative exploratory pragmatic inquiry, focused on ten small retail business leaders in the DMV regions, present valuable insights into customer retention strategies. However, certain limitations must be acknowledged to contextualize the study's scope and applicability. A notable constraint is the regional specificity, as the research concentrated on a specific geographic area. Future research could adopt a more diverse geographic sampling approach to enhance the study's generalizability, encompassing small retail business leaders from varied locations (Ross & Bibler Zaidi, 2019). The exploration of a more diverse geographical sampling population could yield different customer retention strategies that may be effective in retaining customers outside of the DMV.

Another limitation pertains to the relatively small participant pool, potentially impacting the transferability of findings. To address this, future studies should aim for a more extensive and diverse sample size, including participants from different sectors within the small retail industry (Ross & Bibler Zaidi, 2019). The reliance on self-reported data is an inherent limitation, potentially introducing bias. A mixed-methods approach,



combining qualitative insights with quantitative data, could strengthen the study's robustness by triangulating findings and mitigating reliance on self-reported information (Theofanidis & Fountouki, 2018). Addressing these recommendations would contribute to overcoming the identified limitations and advancing the understanding of effective customer retention strategies in small retail businesses.

### **Reflections**

Throughout the DBA doctoral study process, I assumed various roles as a qualitative researcher, aiming to explore customer retention strategies among small retail business leaders. It was crucial to balance my background as a small retail business owner for 22 years with the need to mitigate potential biases. To address this, I refrained from recruiting participants with personal connections, applied reflexivity protocols to enhance trustworthiness, and utilized member checking and a research journal to document reflexive notes and activities.

Reflecting on this experiential journey, I acknowledge the importance of maintaining methodological rigor, ethical conduct, and reflexivity in qualitative research. This process deepened my understanding of customer retention strategies and underscored the ethical responsibility inherent in conducting research involving human participants. The DBA doctoral study process has been transformative, refining my approach to research and reinforcing the significance of ethical considerations in academic inquiry.

## **Conclusion**

In this qualitative pragmatic inquiry, I examined successful customer retention strategies that some U.S. small retail business leaders employed, offering valuable insights grounded in GST. Through a comparative analysis of existing literature and applying GST, the study underscored the interconnectedness of various components within the retail business system. The responses provided by the participants showcased their expertise in executing customer retention strategies that have demonstrated efficacy in maintaining a loyal client base.

The identified themes strongly correlate with both the available literature and the study's conceptual framework. Von Bertalanffy advocated for a comprehensive holistic approach emphasizing the importance of considering all key components that positively influence customer retention. And not focusing on the individual components. The need to adopt and understand the importance of implementing effective customer retention tactics was evident during the substantial restrictions implemented during the COVID-19 epidemic. This pragmatic qualitative inquiry investigated the strategies small retail business leaders use to retain customers. The findings of this study may help other small business owners understand the importance of identifying successful strategies to retain customers and attract future customers.

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## Appendix A: Recruitment Flier

**RESEARCH  
OPPORTUNITY****PARTICIPANT CRITERIA:**

- ✓ Over 18 years ago
- ✓ Leader of a small retail business in Maryland, Virginia or DC
- ✓ Implemented successful customer retention strategies

**PARTICIPANTS WILL:**

- ✓ Scan the QR code to fill in a demographic questionnaire
- ✓ Complete a 45-60 minute interview using Zoom
- ✓ Review your interview transcript (10 minutes)
- ✓ Review study findings (20 minutes)

**SMALL RETAIL BUSINESS LEADERS NEEDED:**

Wanda Fisher Robinson, a doctoral student at Walden University, is seeking 10 small retail business leaders with successful customer retention strategies

For more information, please contact:  
Wanda Fisher Robinson

## Appendix B: Interview Protocol

Date of Interview: \_\_\_\_\_

Respondent Number: \_\_\_\_\_

*1. Introduce self to the participant*

Thank you for participating in this study and your willingness to complete the interview process. My name is Wanda Fisher Robinson, and I'm a student at Walden University conducting research on customer retention strategies used by small retail business leaders.

*2. Introduce the research question, the purpose of the study and answer any initial questions the participant may have.*

The purpose of this study is to identify and explore successful strategies that some U.S. small retail business leaders use to retain customers. The research question I'm trying to address is: What strategies do some United States small retail business owners use to maximize customer retention?

Do you have any initial questions before we get started?

*3. Thank the participant for their participation in the study.*

Thank you again for agreeing to participate in my study.

*4. Review the informed consent form and answer any questions the participant may have.*

Before we continue, I need to verify that you have signed the consent form and understand the ethical standards for this interview. I'd like to remind you that you can withdraw from the study at any time for any reason. If you decide you'd like to withdraw,

please email me and I will destroy study materials, such as the recording of this interview, using data destruction software.

All personal information will be stored electronically and may only be accessed to me via a password. Raw data, such as field notes, will be kept locked in a file cabinet only accessible to myself. When the information from the interview is published in the final study, participant confidentiality will remain. All transcripts and recordings of the interview will be kept private on a password-protected computer accessible to myself only. Do you have any questions about the consent form or any of the measures taken to preserve your confidentiality?

*5. Provide the participant with a copy of the informed consent form for their personal records and review.*

Here's a copy of the informed consent form for your personal records and review.

*6. Begin recording the interview.*

Do I have your permission to begin recording the interview now?

*7. Introduce the participant using their respondent number, the date and time of the interview.*

During this interview, I'm going to refer to you as Participant (Insert participant number). Today's date is (insert today's date) and the time of the interview is (Insert Today's time).

*8. Start the interview using the interview questions.*

1. What strategies do you use to retain customers?
2. How, if at all, have you used social media strategies to retain customers?

3. How do you leverage technology advancements to personalize and enhance the customer experience, and how does it impact customer retention?
  4. What strategies or initiatives have you implemented in your small retail business to train your employees in customer retention techniques?
  5. What systems or processes do you use to enhance customer retention?
  6. What marketing strategies do you use to improve customer retention?
  7. How important is corporate social responsibility to your small retail business, and how does it contribute to customer retention?
  8. In what ways does the quality of your firm's products and services impact customer retention?
  9. How, if at all, do you gather feedback from your customers to assess their satisfaction and identify areas for improvement in your customer retention strategies?
  10. What else can you tell me about strategies to retain customers that I did not ask?
9. *Ask any follow-up questions.*
10. *End the interview and stop the recording. Explain to the participant of the member checking and transcription review process.*

We have reached the end of this interview. Thank you for your participation in this study and sharing your personal experiences with me. I appreciate your transparency and honesty in each of your responses. Do you have any questions about the interview or the research process?

As a reminder, I will take the audio from these recordings and transcribe them verbatim. I will be emailing you a copy of the interview transcript. It would be great if you can review the transcript and make sure that you're comfortable with all of the responses. If you'd like any changes to be made to the transcript so that it more accurately reflects your thoughts and ideas, please let me know. That's an important part of the research process.

*11. Thank the participant for the participation in the study.*

Thank you again for participating in my study. You can contact me at any time if you have any questions or concerns.

### Appendix C: Participant Screening Questions

1. Are you 18 years of age or older?
2. Are you the leader of a small retail business in the District of Columbia, Virginia, or Maryland? [Yes/No]
3. What state is your small retail business located in? [District of Columbia/Maryland/Virginia]
4. Have you demonstrated success in promoting customer retention? [Yes/No]