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Effective International Corporate Diversification and Performance Improvement Strategies

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Walden University

College of Management and Human Potential

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Danielle Oswald

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Walden University
2024

Abstract

Effective International Corporate Diversification and Performance Improvement
Strategies

by

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MBA, Keller Graduate School of Management of DeVry University, 2019

BS, Westwood College, 2013

Consulting Capstone Research Project Submitted in Partial Fulfillment
of the Requirements for the Degree of
Doctor of Business Administration

Walden University

October 2024

Abstract

Ineffective international diversification strategies can potentially cause negative operational performance and return on investment (ROI). Business leaders are concerned with ineffective international diversification strategies, as performance improvement drives business growth, innovation, and profitability in international markets. Grounded in the Baldrige excellence framework (BEF) and stakeholder theory, the purpose of this qualitative single case study was to identify and explore effective international diversification strategies senior leaders can use to create a franchise or growth platform for organizational expansion. Participants were two experts in the business consulting industry in New Zealand who contributed to international diversification strategies. Data were collected using semistructured interviews and a review of organizational data. Through qualitative data analysis, data reduction, data display, and data coding, four themes were identified: effective operational procedures, research and development on risk and emergency preparedness, high-performance industry leadership, and innovative action plan formulation for holistic energy enhancement and performance maximization. A key recommendation is for senior leaders to adopt performance excellence strategies which incorporate elements of the BEF to develop a performance management system and support a franchise growth platform. Implications for positive social change include the potential to improve informed decision-making to benefit stakeholders across various industries.

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Dedication

My doctorate is dedicated to my beloved children: David, Kalista, Luke, Ava, and Xienna who continually inspire and motivate me to achieve greater heights and who hold the key for future generations. I also dedicate my scholarly work to my family and friends, both near and far; to Grandma Katie who has instilled faith and leadership; to Grandma Betzy who has always instilled belief and artistry; to my angels above and on earth who are a lighthouse of hope, inspiration, and cherished memories. My dedication is extended to my parents, Leslie and Greg for all of their unwavering compassion, encouragement, and guidance over the decades. I also dedicate this study to my children's fathers: DJ, who continually empowered me through divorce and J\$Money, who continually served as a literary writing muse in this ambitious doctoral project that inspired the creative process of artistic and scientific writing! Lastly, this is dedicated to all my readers across the globe. Enjoy!

Soar to greater heights on the wings of knowledge – Author unknown

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Section 1: Foundation of the Project

Background of the Problem

Some senior leaders need more effective international diversification strategies to create franchises or growth platforms for global organizational expansion, as ineffective strategies cause negative operational performance and return on investment (ROI) within international markets. If products or services are misaligned with international markets, this can lead to negative social responsibility and competitive inefficiency. According to Dick (2024), franchisees must extract ROI via annual profits and capitalize on territorial strength. Ineffective management causes performance deficiencies and weakened competitive advantages.

My doctoral research was focused on delivering adequate international corporate diversification and performance improvement strategies to influence global modeling of innovative franchise networking and growth platforms. In my doctoral research, I address the potential for senior leaders to strategize their diversification methods in order to maximize stakeholder profitability successfully.

Business Problem Consulting Focus and Project Purpose

The specific business problem is that some senior leaders lack effective international diversification strategies to create franchises or growth platforms for global organizational expansion. Therefore, the purpose of this qualitative single case study was to identify and explore effective international diversification strategies senior leaders can use to create franchises or growth platforms for organizational expansion. The intended

audience for this study was senior leaders within the client organization. The population of participants work in a high-performance business consulting firm.

This firm seeks to create franchises or growth platforms for organizational expansion within the United States of America (USA) and New Zealand (NZ). NZ is the regional geographic territory of the client organization. I was interviewed for and selected as the business scholar-consultant and Walden University ambassador. I was subsequently paired with a vetted consulting firm that was chosen to participate in the Baldrige excellence framework through coordinated efforts between Walden University's Program Director and committee members. Access to the client leader was conducted through Walden University.

I used semistructured interviews with participants as well as organizational data, documents, and archival records. I used nonprobability purposive sampling to obtain information that was relevant to and available among certain groups in which information can only be provided by a few experts (participant eligibility criteria) and is, therefore, referred to as judgment sampling. Judgment sampling is used when information can only be supplied and accessed by a limited population that conforms to researcher criteria.

Moreover, data saturation is unpredictable in qualitative research. I determined the total number of participants available to interview within the client organization was two directors; therefore, I interviewed both directors and continued interviewing additional participants to reach full data saturation. The rule for sampling in qualitative research is that it continues until no new information or insights are obtainable (Bougie & Sekaran, 2020). I used the BEF adapted from the Malcolm Baldrige National Quality

Improvement Act of 1987 for enhancing competitiveness of U.S. businesses. I also used the stakeholder theory by Freeman.

Research Question

What effective international diversification strategies can senior leaders use to develop franchises or growth platforms for organizational expansion?

Assumptions and Limitations

Assumptions

I assumed that knowledgeable and accurate assessment and analysis of the Baldrige framework provided opportunities to identify and close organizational gaps in order to improve quality and performance. An assumption is considered accurate without proof, such as a belief, presumption, or hypothesis (Cambridge Learner's Dictionary, 2024). The presumptions of theories and concepts related to the logical connections between the conceptual framework presented and the nature of the doctoral study include the relationship between the interpretive research philosophy and qualitative research methodology in which Matta (2022) defined an interpretive inquiry as a conceptual basis for advancing methodologically sound case study design. The philosophical and doctoral project assumptions are as follows.

Philosophical Assumptions in Research: Interpretivist et Constructivist Approach

Interpretive research is subjective and socially constructed via a naturalistic approach that includes meaning and applicable theory to develop a richer theoretical perspective and enhance existing literature (Saunders et al., 2020). Moreover, qualitative researchers emphasize the relationship between the philosophy of science and research

methodology (Matta, 2022). Therefore, the scientific paradigms of research explicate the truth of research and regard the epistemology for the nature of knowledge in which the risk of unverified assumptions about the research project is mitigated. My choice of research methodology and philosophy impacted my doctoral study and influenced research decisions and results through research design and data collection.

Doctoral Project Assumptions in Research Credibility and Validity

The doctoral project assumptions for my study for research credibility and validity consisted of statements provided by the client-organization that were assumed to be accurate and provided to the best of one's knowledge. Another doctoral project assumption for my study was that knowledgeable and accurate assessment and analysis of the Baldrige framework provided opportunities to identify and close organizational gaps in order to improve quality and performance. A third assumption included the theoretical perspective and subjective, inductive, naturalist approach towards interpretations, reasonings, and understandings in which such views may vary from other philosophical ideologies and approaches.

Limitations

Access to and reliability of participants' timely responses, including access to valid and credible organizational data and separation of roles limited the scope of my study. Limitations are an act, instance, quality, or state of being limited or something that limits as a restraint (Definition of limitation, 2024). For example, awareness of strategic drift as a self-imposed limitation within my doctoral study would account for strategic choices driven by past assumptions and experiences gained from past successes or

failures. Strategic drift is referred to as a drift in advancement initiatives that continues the same practices that limit competition (Harmon, 2022). Therefore, disruptive innovation and ethical practices are crucial for embracing changes, staying relevant and competitive, and achieving organizational goals.

Transition

Some senior leaders lack effective international diversification strategies for global expansion, as ineffective strategies can negatively impact operational performance and ROI. Therefore, the BEF can be used to improve performance and maximize stakeholder profitability, enhancing overall business performance. In this qualitative case study, I explored effective international diversification strategies senior leaders use to develop franchises or growth platforms for organizational expansion. I used semistructured interviews and judgment sampling, focusing on the United States and NZ.

The BEF enhances competitiveness and performance. I aimed to identify and explore performance improvement strategies for global expansion as well as international diversification strategies for senior leaders to develop growth platforms for organizational expansion. I discussed assumptions, research credibility, and limitations. I used an interpretive and constructivist approach. The study was conducted with a high performance-oriented consulting firm in NZ.

The in-depth literature review of professional and academic literature involving strategic growth solutions, performance enhancement solutions, franchise performance and partnerships, innovative growth solutions, and international franchise solutions is discussed in Section 2. Section 3 includes a fully detailed review of the research project

methodology, including capstone research project ethics, the nature of the project, population, sampling, and participants, data organization and analysis techniques, and reliability and validity. Section 4 includes information about the client organization, BEF, research project findings, and professional conclusions. In Section 4, I include an organizational profile, address leadership, strategy, and customers, measurement, analysis, and knowledge management, workforce, operations, and project results. The doctoral project concludes with business recommendations for professional practices and positive social change implications.

Section 2: Literature Review of Business Consulting Topic

A Review of Professional and Academic Literature

In this qualitative single case study, I aimed to identify and explore effective international diversification strategies senior leaders can use to create franchises or growth platforms for organizational growth. In Section 2, I address strategic growth solutions, performance enhancement solutions, franchise performance and partnerships, and innovative growth solutions.

The total number of literature resources was 117. 18% of sources were published prior to 2020, and 80% were published between 2020 and 2024. There were 55 peer-reviewed journals included in my research, or 47.4% of total sources. I used the following search terms: *corporate strategies, diversification, strategic planning, risk management, cost analysis, cost containment, related and unrelated lines of business, business expansion, portfolio management, segment profitability, business expansion experts, profitability consulting, portfolio management solutions, diversification partners, strategic solutions, risk management advising, stakeholder strategies, performance reviewers, management experts, best practice consultants, international diversification solutions, strategic planners, business excellence advisors, and organizational performance consultants.*

I used the following databases: Business Source Complete, Gale Academic OneFile Select, ScholarWorks, Scopus, PubMed, Web of Science, JSTOR, ERIC, ScienceDirect, IEEE Xplore, Academic Search Complete, PsycINFO, ABI/INFORM

Collection, EBSCOhost, CORE, Directory of Open Access Journals, Paperity, and ProQuest.

Strategic Growth Solutions

Diversification is a strategic approach that company leaders use to increase their resources and capabilities through alliances, mergers and acquisitions (M&A), and green market entry. It can have value-enhancing effects, such as increasing leverage and operational efficiency, increased project value, reduced taxes, increased discretionary resources, and cross subsidies that offset performance (Berger & Ofek, 1995). To support strategic growth solutions, organizational leaders use diversification strategies in various contexts, including product and services, geographic and global entry, corporate and shareholder performance, and organizational corporate social responsibility (CSR) investments.

Diversification

Diversification is used by senior leaders to expand their resources and capabilities. Dyer et al. (2020) indicated there are three ways to diversify primary organizations: green market entry, M&A, or building alliances. Depending on methods, some senior leaders may choose a corporate strategy and use multiple adjacent markets, industries, or lines of business (LOB) as well as diversify horizontally or choose business unit strategies and focus on a single market, industry, or LOB.

However, ROI may vary. According to Dyer et al. (2020), senior leaders must employ risk and portfolio management and shareholder returns can significantly be interrupted or destroyed if resources are not exploited or expanded. Moreover, Dyer et al.

argued that senior leaders must preserve their pride, investment, governance, resources, and capabilities when determining appropriate methods for diversifying primary organizations.

Measures of Risk

Loss mitigation approaches include using increased debt capacities and tax shields, controls to limit overinvestments, cross-subsidization, and limiting suboptimal management and poorly performing segments to increase operational efficiency (Berger & Ofek, 1995). Crețu (2012) defined diversification as acquisition of new business segments or transferring and merging organizational structures. Diversified companies have higher long-term debts and reduced shareholder value but higher total assets, increased senior leader compensation, and improved stock options. Moreover, diversification strategies can provide a significant advantage against disinvesting, including terminating contracts with cost disadvantages (Crețu, 2012). Managers can benefit from reduced portfolio risks, increased recognition and expansion, and higher rewards for management.

Performance measures of diversification within unrelated lines of businesses can be determined by industry and firm-level factors to decide if unrelated diversification strategies are beneficial. Cerrato et al. (2022) suggested outcomes of diversification are contingent on the industry and internal capital markets, which affect financial constraints; however, unrelated diversification within emerging markets is beneficial and can improve performance and competition. In addition, diversification within different industries enhances financial control, viability, and allocation, with reductions in operating risks,

leading to increasing value and diversifying during economic depressions within advanced economies (Cerrato et al., 2022). Unrelated diversification strategies are used to enter new markets and geographic territories, further building upon availability of internal capital markets for senior leaders to acquire enough leverage to diversify in international territories effectively (Holder & Zhao, 2015; Zhou, 2022).

Philanthropic diversification can be part of any organization's financial strategy to leverage entering geographic territories or enhancing existing territories through additional funding. Endowment funds are built to promote and enhance quality of life within communities and positively affect complex relationships. Networks are used to deploy capital, build capacity, and shape community development. Esposito and Besana (2018) found nonprofit community foundations leverage stakeholders via grant funds; therefore, revenue diversification is a financial strategy to increase generosity and humanity. Saiia and Schwartz (2022) found organizational slack refers to excess capacity of unused resources to sponsor, fund, or underwrite community projects. Likewise, nonprofit organizations and community foundations exemplify philanthropic diversification within communities and enhance CSR that some organization leaders are compelled to support.

Corporate Performance

Larger organization leaders face different impacts on diversification due to their expertise and capital compared to smaller focused organizations, which may have more limited options. For instance, Lawrey and Morris (2019) indicated that diversified organizations outperform single-focused organizations in the long run and the advantages

of diversification peak at 36 months. Additionally, the authors discovered that significantly more prominent and diversified organizations have higher total assets and return on assets (ROA), which may have income-smoothing benefits for diversification. Similarly, Wan (2021) found that the relationship between capital structure, diversification strategies, and corporate performance is demonstrated by examining the impact of technological advancement on competitive diversification strategies. Unrelated lines of business in technological innovations improve corporate performance and competitiveness.

Using research and development (R&D) techniques and broadening the scope of technology minimizes risk and maximizes value. Businesses must adopt cutting-edge technological innovations to lower risk and improve efficiency (Wan, 2021). Global diversification, which is a commonly used tactic to gain an advantage over competitors in recently emerging markets, was examined by Zhou (2022). This strategy includes philanthropic giving to support CSR, build a strong reputation, additional alliances, favorable business environments, and corporate legitimacy. Furthermore, by diversifying and expanding geographically to include new stakeholder groups, a company's global diversification can improve the stakeholder environment. Zhou discovered that charitable giving may encourage organizations' involvement but has yet to discern a relationship with global diversification. Wan (2021) and Zhou (2022) validated the diversification strategies and discussed the rationale for new ventures.

Performance Enhancement Solutions

Performance enhancement strategies are essential to manage intricate business projects and subprojects effectively and to encourage corporate diversification. Likewise, effective management and well-informed decision-making are necessary to complete projects successfully. While the Markowitz model and stakeholder approach concentrate on risk reduction and increased returns, auditing and forensic accounting can improve ethical due diligence. Thus, one way to achieve international expansion through franchising is by strategically entering domestic and international markets. CSR and sustainable development both help to improve a company's competitiveness and image. Therefore, this section on performance enhancement solutions covers subjects including (a) Markowitz's model and Freeman's stakeholder theory, (b) economic diversification: resilience through R&D, and (c) achieving scale: international relationships for business expansion.

The Markowitz model is widely accepted for risk reduction, enhanced returns, and optimized performance through asset diversification strategies. While the context of this model is mainly in the financial industry, its application can be adjusted to include other industries, as the basis for diversification in this context is to spread the risk from one single instance and increase returns across multiple instances. Hanif et al. (2021) and Mohammadi et al. (2022) studied the Markowitz model, which uses diversification to reduce risk. Hanif et al. and Mohammadi et al. discovered that applying the Markowitz model to risk reduction and investment selection significantly increased the efficiency of optimized portfolios.

Additionally, Sexauer and Siegel (2023) examined Markowitz's portfolio construction and asset allocation with an emphasis on modern portfolio theory (MPT), also known as mean-variance optimization (MVO); they regarded MVO as the gold scientific standard for directing portfolio decisions, giving investors better, less hazardous investment returns. Therefore, a franchisee's investment selection of a franchisor's business model may be enhanced through optimized efficiencies in asset allocation, in which an organization's stakeholders are one of its most valuable assets.

The stakeholder approach is pro-business, underscoring capitalism as a critical, normative system of social cooperative greatness where organizations can improve business by accepting the responsibility for actions that affect others. Freeman (2022) studied strategic management and business ethics, emphasizing the original stakeholder theory from 1984. Freeman (2010) developed the stakeholder theory, which explains how different stakeholder groups impact organizations. To ensure accountability for the value-creating business relationship, he discovered that a strategy needs to be developed for each group and evaluated realistically. In addition, Stacy (2023) analyzed Freeman's stakeholder theory and identified stakeholders as an organization's most valuable asset that supports its CSR and organizational value.

Furthermore, the community, or stakeholders, benefit from increased financial resources being mobilized, enhanced efficacy and capacity, stability and growth, and support for social welfare and social missions, or, in the case of an elite focus, support for preserving the arts and humanities. In their study of philanthropy, Hwang and Young (2022) discovered that policy implications regarding the diversification of economic

resources and structures facilitate effects on social capital. Therefore, CSR improves local communities' needs, interests, and demands through philanthropic diversification of financial resources to improve a community's capacity to mobilize collective resources.

Economic Diversification

Economic diversification through intelligent specialization nurtures sustainable growth through research and development (R&D) and investments in innovation to strengthen stakeholder capacity and enable local development with cross-border mobility. Nicula et al. (2023) discovered a correlation between economic diversification and intelligent specialization, in which specialized policymaking for each geographic territory promoted sustainable and balanced growth. The European Union's cohesion policy, which adopted an intelligent specialization approach to identify strengths and assets within regions with broad stakeholder involvement, was covered by Ouvinen (2021). Ouvinen concluded that investments in research and innovation capacities ensure economic sustainability and resilience, with the building of cooperative, efficient partnerships as a potent means of empowering local and regional development and mobility. Hence, organization leaders could use this diversification strategy to strengthen their resilience through collaborative economic diversification to mobilize resources through investments in R&D and innovation to enhance stakeholder capacity, economic growth, sustainability, and resilience across different geographic territories (Hwang & Young, 2022; Nicula et al., 2023; Ouvinen, 2021).

Achieving Scale

For my doctoral research, it is crucial to expand the topic of diversifying the business prototype to include international expansion through strategic franchising entry into one or two domestic and international target markets. Global expansion starts with developing resources to support the expansion by successfully modifying the business prototype (A guide to world domination, 2011). Frequently implemented, effective modifications to the business model include features for expanding into new markets and integrating local developers and master franchisees. When transitioning from a home market to a foreign market, consider factors like time zones, language barriers, local laws, customs, and rival organizations (A guide to world domination., 2011). Therefore, since a master franchisee is trained to become both a franchisee and a franchisor, having an area developer or master franchisee is essential to successfully managing external geographic factors and diversification of the business prototype.

After achieving its scale, operating efficiencies, and confidence, an organization should naturally move on to international expansion as the next step on the new growth path. Patinkin (2018) outlined the winning setup for global growth. The winning configuration is comprised of a process for conducting market research, franchise documentation, legal work, safeguarding the brand's image, financial and growth models, and contracting a local partner who could become a master franchisor or an area developer. Furthermore, master franchise agreements to expand into foreign markets offer superb opportunities for achieving scale through a cooperative process.

Franchise Performance and Partnerships

Franchise performance and partnerships emphasize the value of competitive business intelligence and knowledge management, the challenges of managing franchise relationships and governance, and the adaptability of coaching and leadership techniques to boost organizational value. This section covers the following topics: (a) complexities and governance of franchise relationships, (b) knowledge management and competitive business intelligence, (c) techniques for increasing organizational value, and (d) ethical business conduct, organizational capability, and social duty in the business sector.

Franchising is a significant international growth strategy (Patinkin, 2018) that is impacted by national and global governance regulations. Franchising is comprised of business-to-business (B2B) relationships between the franchisors, allowing franchisees to use their business model through licenses for the sale of products or services (Rickard & Conaway, 2023), which can improve CSR, network performance, and brand equity (Gupta et al., 2021). Although product and service innovation, strategic marketing, and financial planning impact growth and profitability, knowledge management, knowledge transfer, and strategic innovation management are essential to business success.

Complexities and Governance of Franchise Relationships

Promoting performance, capability development, and leadership coaching improves clients' self-efficacy, satisfaction, effectiveness, and problem-solving abilities (Passarelli et al., 2023). Boulay et al. (2023) indicated that the franchise relationship is essential to the franchise's performance, growth, and success. Socioeconomic collaborations indirectly impact performance through their effects on cooperation,

customer relationship management, and franchisor idiosyncratic investment (Dubey et al., 2023). Increased sales, global expansion, and brand awareness can all be achieved through franchising.

By integrating international governance strategies, franchisors lower regulatory burdens by encouraging preentry planning and asset diversification in local markets through enhanced commitment, authority, and administration. Franchisors' use of international governance techniques affects commitment, authority, and administration (Hoffman et al., 2020). Through franchising, an organization's intangible assets—such as its brand name and system-specific knowledge—are used in a new market by a franchisee, whose intangible assets also include local market expertise (Brookes & Altinay, 2011). The use of governance modes in franchising emphasizes the value of asset diversification in local markets and preentry planning. Rickard and Conaway (2023) stated that with less onerous regulations for business owners, there are more franchise opportunities and lower regulatory burdens in the United States. Therefore, various perspectives on franchise performance consider socioeconomic indicators, location and regulations, ongoing cooperation between companies, and the possible influence of knowledge sharing on the feasibility of business model replication.

Knowledge Management and Competitive Business Intelligence

Knowledge management positively affects publicly traded companies' sustainable performance (Vafaeinejad, 2023). A competitive advantage requires knowledge transfer between the franchisor and franchisee (Gorovaia et al., 2023). Vafaeinejad (2023) researched senior managers in administrative management and general management

consulting services to examine the connection between knowledge management and corporate success. The authors discovered that knowledge management integrated with financial technology and business intelligence can enhance sustainable performance. Additionally, Gorovaia et al. and Vafaeinejad proposed that several performance domains are driven by strategic management.

In addition, Gorovaia et al. (2023) advised for franchisors to transfer business concepts effectively to improve performance successfully. Gorovaia et al. described knowledge management and knowledge transfer effects on franchise performance, specifically the use and transfer of tacit system knowledge, such as meetings, conferences, and trainings, and the use and transfer of explicit system knowledge, such as through the use of IT-based mechanisms such as emails, instant messages, and intranet. The authors indicated that knowledge transfer between the franchisor and franchisee is the most critical component to gain a competitive advantage; however, without the proper transfer of the business concept, the franchisee would be unable to replicate it, and performance would deteriorate; therefore, the franchisor must combine multiple knowledge transfer techniques to facilitate the transfer of system knowledge to improve franchise performance.

Similarly, Kehbila (2021) and Perdreau et al. (2023) elaborated on the significance of strategic innovation management for businesses' expansion and financial success. Kehbila (2021) emphasized the five primary components of strategic innovation management for sustaining business growth and profitability: strategic planning, business model innovation, marketing management, product innovation, and financial planning.

These five components function as a mutually supportive system and serve as a road map for creating powerful alignment mechanisms that map and underly processes to drive business performance, create game-changing plans for reshaping and transforming industries and value chains, and drive spectacular growth and profitability. Perdreau et al. (2023) explained franchise management capabilities and development strategies that lead to superior franchise system performance. The authors indicated using a configurational approach to develop a model for dynamic and operational capabilities that consist of strategic, organizational, and managerial processes to create value for firms. Therefore, diversification can sustain growth and profitability by utilizing models, roadmaps, and frameworks to propel business growth and profitability.

Techniques for Increasing Organizational Value

Power corresponds to effectively building a network of business relationships and understanding the ethical and philosophical components of obtaining, using, and increasing power for establishing international connections, individual empowerment, and new growth paths for achievement. Boss et al. (2023) emphasized Plato's philosophy that the measure of a man is what he does with power. Boss et al. found that power is fundamental in management, and interpersonal power is fundamental in consulting. When acknowledged and comprehended, interpersonal power—rooted in trust—boosts output; trust is a powerful tool to increase organizational power.

In addition, Desiderio and Frino (2023) also emphasized the importance of organizational responsibility which includes knowledge, culture, learning, leadership, and trust to promote meaningful work among stakeholders. The authors suggested that CSR

can improve an organization's competitive edge by utilizing technology's dynamic nature, problem-solving skills, and decision-making processes. Roy (2023) also suggested several measures to boost productivity, such as better customer experience channels, hybrid work integrations, and enhanced digital experiences through super apps.

Therefore, a global mindset strategy called *systems thinking* seeks to boost an organization's value, gain an edge over competitors, and improve stakeholder trust (Viera, 2023). Gaining a competitive advantage through AI investment strategies should consider long-term growth to be fully integrated into lifestyle choices. Therefore, a solid foundation is necessary for aligning corporate goals and objectives. Hence, aligning corporate goals to increase profitability and competitiveness requires strategic planning (Kamariotou & Kitsios, 2022) and systems thinking. Jairam-Owthar et al. (2022) claimed that investments in information technology and systems boost economic efficiency, environmental sustainability, and productivity, as performance monitoring and evaluation are essential for gaining a competitive edge. By taking a proactive approach to environmental obligations, environmental prioritization boosts operational effectiveness and profitability and meets stakeholder expectations (Huang et al., 2023).

Ethical Business Conduct, Organizational Capability, and Social Duty in the Business Sector

Previous researchers have found that CSR significantly impacts business outcomes by combining ethical business conduct, organizational capability, and social duty in the business sector (see Table 1).

Table 1*CSR Outcomes on Business*

CSR impact	Citations
Enhanced organization performance through policies and practices	Carmen-Florentina (2021)
Improved triple bottom line	Huang et al. (2022)
Decreased idiosyncratic risk	Sciarelli et al. (2023)
Lowered unique risk, boosted competitiveness, and enhanced triple-bottom-line performance	Carmen-Florentina (2021), Huang et al. (2022), Sciarelli et al. (2023)
Increased donations	Bosa (2022)
1) Positive relationship with consumer purchase intention; 2) CSR has a positive relationship with brand admiration; and 3) brand admiration acts as a mediator between CSR and purchase intentions	Gupta et al. (2021)
Creative differentiation and increased financial performance	Banker et al. (2023)
Increased financial performance and support of stakeholder theory	Asadi et al. (2022)
Positive mediator between financial and non-financial performance	Saeidi et al. (2021)

Innovative Growth Solutions

Innovative growth solutions emphasize the relevance of developing a methodical, proactive, and knowledge-intensive approach to resource management encompassing strategic project selection and management. In addition, effective change management, strong franchise relationships, entrepreneurial abilities, financial performance, and education are essential for long-term growth. The section covers sustainable holistic development strategies, CEO performance benchmarking, senior leader governance, initiative-taking strategies, business relationships, transformational leadership, international leadership frameworks, strategic enterprise management, and internet and marketing capabilities.

Sustainable Holistic Approach to Development Strategies Through Innovative Resource Configuration and CEO Performance Benchmarking

Dynamic interactions between processes and practices interplay with innovative ideas to generate specific outcomes, enabling organizational project selection to be strategically prioritized and managed. Annosi et al. (2020) investigated resource management strategies and resource configuration for new products or service development. Proactive, systematic resource management is required to effectively manage project portfolios along with whole-environment prioritization via a sustainable holistic approach. Annosi et al. asserted that strategizing innovative ideas is complex and knowledge-based, requiring strong leadership to balance ideation with organizational goals. Moreover, organizational performance is linked to managerial performance; however, Jayaraman et al. (2021) suggested that relative performance evaluation (RPE) theory and agency theory consider the total performance of measuring managerial efficiency and performance. Therefore, emphasis is placed on evaluations relative to peers or competitors to identify market competition.

Differentiation with peers or competitors is a strategy for either following what a competitor does, as in relative performance evaluated (RPE) senior leaders, or optimally balancing the advantages and disadvantages of differentiating from that peer group, such as non-RPE senior leaders. The aspects of performance improvement, in which RPE and effort may be incentivized within contracts, are enhanced and optimized through strategic differentiation. Schäfer (2023) examined RPE and strategic differentiation in senior leaders' compensation contracts, finding that effort incentives can lower organizational

risk and raise systematic and moral hazard risk. Similarly, Wruck and Wu (2022) investigated the effects of absolute performance evaluations (APE) and RPE on senior leader risk-taking and decision-making about performance-based remuneration plans; they concluded that incentive compensation contracts may raise unnecessary risks if external shock factors are not considered. Therefore, strategic senior leader flexibility is enhanced by implementing RPE with proper controls to prioritize ethical resource management effectively.

Senior Leader Governance and Management

To combat environmental issues and safeguard natural resources, Huang et al. (2024) researched organizational leaders' difficulties when implementing green initiatives, such as digitalization. They discovered that green policies are essential for creative operational excellence since companies rely primarily on natural resources for production and income. Jamalnia et al. (2023) indicated that sustainability knowledge, training, resources, and sustainable governance approaches (SGA) enhance environmental sustainability. With an emphasis on risk management, they created a decision support system model to select SGAs effectively. Jamalnia et al. found that stakeholders bear concrete and abstract risks, encouraging organizations to embrace and conduct sustainability programs. Huang et al. also emphasized the significance of a direct-holistic strategy that applies cost-benefit analysis to allocate high resources and cascades sustainability compliance to lower tiers.

Through corporate governance theory, the shareholding system for collective assets (SSCA) reform enhances collective asset management (CAM); therefore,

collective asset management becomes a corporate governance structure that supports the interests of the collectives and their shareholders. Sun et al. (2024) investigated a market-oriented corporate governance model with SSCA and CAM, including resource and non-resource assets. Corporate governance theory enhances collective asset management systems by allowing shareholders to monitor senior leaders (Sun et al., 2024) promoting asset diversification and protection strategies for improved governance and management.

Initiative-Taking Strategies in Business Management

A company's emphasis on global initiative-taking strategies in business management is positively impacted by environmental innovation (EI) and initiatives for clean production (CP) (Quintana-García et al., 2022) in which the significance of resource management and the incorporation of environmental management into business management are underscored. Green policies are more likely to be implemented by organizations that embrace ecological strategies, such as environmental regulation, CSR, and sustainable committees (Javeed et al., 2022). Long-term profitability and shareholder perception depend on balancing policies and actions. Shah and Soomro (2021) have demonstrated that implementing environmental strategies enhances a business's performance, reputation, and image and increases stakeholder profitability and CSR. Thus, enforcing a structured system and conducting a market analysis can improve the performance of an organization.

Business Innovation and Market Appeal with Strategically-Aligned Portfolios of Projects

Front-end innovation (FEI) incorporates ideation, innovative management, strategy, foresight, and incremental innovation (Castro & Ferreira, 2021). Castro and Ferreira emphasized the significance of FEI in successful product or service development. The research and development (R&D) and in-depth market analysis that are essential for planning and creating a franchise business plan are improved by this assimilation. Richard et al. (2020) indicated that coordination and consolidation of initiatives are necessary for intelligent transformation to accomplish a worldwide goal. Consistent and realistic project selection should consider improved technology integration processes, which require strategic support vital to diversification and performance improvement techniques through the modernization of integrative technology.

Gaining competitive advantages and maximizing organizational performance requires creative and strategic leadership. Performance is maximized through innovative business solutions, technology integration, and adaptable resource management. Zaman et al. (2020) indicated that successful project portfolio governance moderates and strengthens transformational leadership and project portfolio success. A strategic and innovative orientation significantly mediates the effects of leadership on success. Zaman et al. have underscored the significance of visionary, inspirational, motivational, idealistic, and intellectual leadership in optimizing organizational performance and achieving competitive advantages. Competitive, creative business solutions have front-

end innovation, technology integration, cross-functional alignment, flexible resource management processes, and combine transformational leadership with project portfolio management (PPM) to maximize organizational performance and competitive outcomes (Castro & Ferreira, 2021; Richard et al., 2020; Zaman et al., 2020).

Strategic Management, Objectives, Planning, and Development Systems

Dweba and Thakhathi (2021) and Sambo and Van der Walddt (2022) examined performance management by evaluating financial performance and return on investment (ROI). The impact of performance management on augmenting an organization's performance efficiency was illustrated. In their 2022 study, Sambo and Van der Walddt concentrated on creating public performance management and development systems (PPMDSs) for the public sector. The authors highlighted how important motivation is for establishing strategic objectives, assessing worker performance, and identifying exceptional individual achievement. Furthermore, Sibiya and Subban (2023) investigated the variables influencing strategic management, emphasizing the function of senior leaders in conducting and overseeing strategic goals, such as the significance of planning, developing, implementing, monitoring, and measuring strategic performance management. It is recommended that strategic execution and management align with the vision, mission, and pertinent targets to guarantee performance excellence.

Knowledge Exchange, Management, and Competitiveness of Firms

Al Akhzami et al. (2023) examined the difficulties organization leaders encounter in adjusting to the ever-evolving world of auxiliary tools and systems. They discovered that putting knowledge management systems into place is a productive and methodical

way to enhance comprehension, cooperation, and processing. As a multifaceted approach, knowledge management fosters innovation and enhances performance through the development and exchange of knowledge. Aljumah et al. (2022) examined the effects of competition and the acceleration of globalization. They discovered that any disconnect between management, technology, and knowledge management can negatively impact a company's performance. Knowledge management, well-utilized technology, human resource management, and prompt and transparent communication amongst all business divisions were the four key pillars to support improved firm performance.

The analytical qualities of performance improvement strategies present an opportunity to ensure a positive association with implementing knowledge management systems, utilizing capabilities better, and enhancing the quality and agility of processes and operations. Ugo-Agharanya et al. (2021) discovered that knowledge sharing is essential to staying competitive, developing new skills, streamlining work procedures, and boosting output. Therefore, proficiency in communication guarantees efficient operations, a thriving atmosphere, and professionalism. Additionally, the authors emphasized that knowledge is distinct and superior to data or information and is shared more widely, performed better, and advanced within an organization by utilizing information and communication technology such as mobile phones and the internet. Creating international networks for communication is essential for supporting innovation in communication channels and boosting knowledge sharing and competitiveness.

Benchmarking Financial Performance

I have examined the dynamics between franchisors and franchisees in the context of international franchise consulting and the factors that contribute to complex franchise success. Franchising enables franchisors to grow and achieve their business objectives prosperously. Obtaining robust backing from venture capital firms has the potential to enhance competitive advantage and expand the global reach of franchisors. Boulay et al. (2023) indicated that the franchise business model's success depends on several factors, including economic and financial performance, entrepreneurial aptitude, education, and franchise relationships. Franchises that use business formats and trade names offer comprehensive programs for launching and running under a reliable brand and operating system that has been tried and tested (DE Visuals, 2010). Franchises benefit from vested interest, exclusive distribution, support availability, economies of scale, and brand awareness (Hance, 1995); therefore, an intelligently designed franchise system positions international competitive advantage exponentially.

Business Relationships and Planning

Contract modifications, track records, and survival analysis are all part of business relationships and planning to safeguard investments, such as franchises. Pandemics can significantly and negatively influence franchise survival (Abd Aziz et al., 2022), as they can cause decreased revenue, job losses, and shifts in consumer preferences. Abd Aziz et al. emphasized how the government can help franchise owners remain resilient and how crucial it is to have access to funding, training, virtual franchise

exhibits, and business development grants to survive. Franchising is a well-liked business model that boosts the economy and survival prospects.

Kerrick and Cumberland (2023) identified some of the risks associated with contract law when franchisors sell their franchises and operations are transferred. With new franchise ownership came a higher risk of franchise failure, mainly when suppliers and vendors were changed, and the necessity of a successful exit strategy during initial business planning was emphasized. Exit strategy options include closing because of retirement, illness, or unfavorable economic events, selling the franchise to a third party, or giving ownership to an heir. The significance of risk management was emphasized by Abd Aziz et al. (2022) and Kerrick and Cumberland (2023) in business planning to consider unfavorable risks like pandemics, franchisor ownership shifts, and contract language changes for pre-planning and proper execution.

Using Transformational and Entrepreneurial Leadership to Manage Performance and Innovation for Baldrige Criteria, Resource Planning, and Economic Growth

Effective leadership improves business performance through innovation management and workforce development. Leadership is a driver for innovation. D'Souza (2023) found that high drive, inventiveness, and vision are necessary to improve organizational performance. Innovation management is a smart business strategy for obtaining a competitive edge. As the researchers focused on effective leadership in enhancing business performance in entrepreneurial management and workforce development, senior leaders should use training initiatives that cultivate entrepreneurial skill sets to find and hire talent and promote innovative work behavior.

Further, leadership effectiveness and its impact on performance encompass leadership strategies essential for small businesses' survival and enhanced organizational outcomes. Wilson (2024) underscored the significance of efficacious leadership styles for an organization's sustained performance. Key tactics include resource planning that guarantees consistency, organizational morale, flexibility, and adaptability; early business planning with an inspiring vision; and transformational leadership, which encourages proactive decision-making, selflessness, and self-sacrifice for organizational improvement.

Therefore, D'Souza (2023) and Wilson (2024) have discussed in detail the impact of leadership on an organization's process performance and efficiency; they have also discussed various strategies to encourage performance excellence, like applying the Baldrige criteria and using innovative management techniques. For improved business excellence, performance excellence strategies are created and implemented by business leaders and incorporated into native strategic goals, action plans, business models, procedures, and language—moreover, transformational and entrepreneurial leadership results in long-term sustainability and enhanced competitive advantage.

Reliable Frameworks for International Leadership and Competitive Franchise Models

Franchise ownership is a significant investment choice due to reputable franchisor concepts, brand, information, and financial success (Dick, 2024). In addition, franchises are excellent investments, as Dick (2024) indicated; there are four primary reasons why: 1) reputable franchisor concepts, 2) reputable franchisor brand, 3) reputable franchisor information and training on operations, and 4) a reputable system to generate financial

success for the franchisee when operated properly. In exchange, the franchisor is compensated off the top for its concepts, systems, support, knowledge, and brand from the franchisee. Therefore, the franchising model is proliferated internationally for business expansion; however, franchisees must excel in all managerial aspects to extract their return on investment (ROI) in annual profits and capitalize on territorial strength. Franchise operations located in multiple states and territories are influential entities, with franchise buy-in being a wise financial choice.

Franchising is a business expansion strategy that has been used by small and medium-sized businesses for over a century to diversify into new markets to advance CSR by utilizing human capital and sustainable practices (Au-Yong-Oliveira & Sousa, 2022). Franchising also has a significant impact on brand advantage. The history of franchising spans over 500 years, originating from France and possibly ancient China (Mercadal, 2021). Franchise originates from the French word *Franche*, meaning the privilege of investing, free, without constraint, in which the franchise license fee paid to the monarch of that time was in exchange for an agreement between the franchisee to sell the product or service under the franchisors' brand or trademark (Mercadal, 2021). The parallel capabilities of synchronizing international operations with franchising's historical and paradoxical values benefit both parties, and make it a popular business expansion mode.

Internet and Marketing Capabilities

Applying effectual thinking is a personal entrepreneurial competency involving skill and knowledge to create business value and effective problem-solving. Further,

effectuation leverages contingencies and liabilities that may arise from uncertain situations to create new opportunities. Dargham's (2021) application of effectuation theory indicated that individuals have the power to influence the future by creating the conditions necessary for success. Organizational goals, tactics, and initiatives that complement business planning should be included in a marketing plan along with critical performance elements such as social impact, social value, social entrepreneurship, and social return on investment (SROI) (Treinta et al., 2020). Therefore, using technology-based tools, senior leaders can identify opportunities for effectual application to strategically coordinate and align business objectives accordingly.

Transition

Diversification can assist senior leaders in terms of expanding their resources and capabilities by employing strategies such as M&A, strategic alliances, and green market entry. Given that more significantly diversified shareholder organizations are less risk-averse, these strategies may have value-enhancing effects. Therefore, gaining a wider geographic audience boosts profits and shareholder value, while strategies for improving performance are crucial for overseeing intricate business initiatives and promoting corporate diversity. The Markowitz model can be used to reduce risks and increase returns for stakeholders. When considering variables like time zones, language barriers, customs, and rival organizations, franchising is essential for international expansion. Section 3 includes information about project ethics, the nature of the project, population, sampling, and participants, data organization, and reliability and validity .

Section 3: Research Project Methodology

Capstone Research Project Ethics

Section 3 includes information about research methods. Before the project was initiated, there was no prior relationship between the client organization and me. I functioned as the primary data collector, researcher, and scholar-consultant through semistructured interviews, research analysis, and BEF assessments. I adhered to ethical principles which were integrity, professional conduct, and confidentiality.

As the researcher in this study, I adhered to ethical obligations of the Institutional Review Board (IRB) and *Belmont Report* protocol. The *Belmont Report* suggests basic ethical principles that are conducive for general judgment involving three ethical principles: respect of persons (autonomy and protection), beneficence (acts of kindness or charity beyond obligation), and justice (fairness in distribution). In addition, I obtained certification through the Collaborative Institutional Training Initiative (CITI) program regarding research ethics, safety, and compliance to meet regulatory requirements for research conduct and administration.

All semistructured interviews took place after informed consent was obtained. Consent forms were sent via electronic mail, and participants replied with the words “I consent” if they agreed to participate in the research project. Participants could withdraw from the study at any time; the service order agreement (SOA) detailed additional procedures for the client organization and me (see Appendix A).

Further, I ensured client organization information was confidential and there was no information about participants, identity, or location. I also ensured data privacy and

minimized any possible conflicts of interest with stakeholders. I upheld professional principles to fulfill my consulting role. In addition, research data will be securely stored for 5 years (01-12-23-1182725). Data provided by the client organization was exclusive to this research project, and I will not use it for any other purpose. Participant information will not be used or distributed for any future research studies.

Nature of the Project

A qualitative single case study design was chosen. Bougie and Sekaran (2020) indicated qualitative data includes interview notes, transcripts, and answers from open-ended questions from primary or secondary sources, and analysis is geared towards making valid inferences from data. Using a single case study design enables analysis of a single organization. Case studies are practical for qualitative research. They involve collecting information to analyze and provide perspectives regarding a problem and potential solutions (Bougie & Sekaran, 2020). In this instance, the case study is a high-performance strategy-focused business consulting firm.

Population, Sampling, and Participants

In this qualitative single case study, the setting was a single business consulting firm. I analyzed the client organization using the BEF. The second committee member and academic coordinator functioned as business liaisons early on, establishing introductions and connections between myself and the client organization. Professional working relationships were further established via electronic communication and continued over virtual platforms in compliance with IRB requirements. I established

background information regarding participants' culture, policies, protocols, and regulatory compliance requirements before data collection.

The client organization consists of two senior leaders who met eligibility criteria for semistructured interviews to justify selection of participants based on their business consulting expertise. The eligibility criteria of the research participants also coincided with eligibility of the BEF in which an organization seeks to improve its innovation, competitiveness, and agility (NIST, 2016); therefore, the intended audience for the results of this study comprised the senior leaders within the CO. Per IRB compliance, no other collection of data was approved nor contained herein, such as data from surveys, focus groups, observations, video recordings, nor external business leaders and the interviewees are the only participants for this case study design.

Therefore, the qualitative single case study reached data saturation at a stage when any additional findings from the data provided no new results, insights, information, or themes (Saunders et al., 2020). Since the sample of data collected must proportionately represent the population and a clear focus for selecting the sample is based on the conceptual BEF and stakeholder theory in which the credibility of findings is essential, the non-probability sampling method justifies the purposive sampling technique. As Saunders et al. indicated, purposive sampling, also called judgment sampling, is often used with small samples in informative case study research dependent upon the research question. Further, Bougie and Sekaran (2020) defined purposive sampling as a rational basis for collecting required information from a particular group in which there was a non-probability of being selected from the population as a sample.

In summary, non-probability purposive sampling defines the purpose of the study to obtain information relevant to and available within certain groups in which information can only be provided by a few experts (participant eligibility criteria) and is, therefore, referred to as judgment sampling (Bougie & Sekaran, 2020). Judgment sampling, as indicated by Bougie and Sekaran, might be the best sample design choice, primarily when the information needed can only be supplied and accessed by a limited population that conforms to the researcher's criteria.

Data Collection Activities

Data collection was limited to semistructured interviews with client leaders, organizational data, documents, and archival records. As the scholar-consultant, I was the primary data collection instrument and used BEF as the primary tool for gathering data. The client-organization leader was invited to participate in semistructured interviews at a time and day that is most convenient through a scheduling platform. Once the day and time were chosen, a meeting invite was sent. Conduction of semistructured interviews took place over a virtual communication platform to streamline communication and timely effectiveness for up to 40-minute sessions on a 1:1 basis to review each category within the Baldrige framework.

The client organization leader provided valid consent to audio-recorded interviews with opportunities to clarify transcribed statements in a completely voluntary nature with the option to withdraw from the project at any time. The doctoral study did not pose any significant health risk beyond daily life and aimed to provide results and insight to support the organization's success. Interview transcripts and raw data will be

kept confidential and securely stored on a password-protected drive for 5 years, as IRB requires, after which the data will be destroyed. In addition, a communication journal was utilized to note the dates and objectives of the correspondence throughout the doctoral project. Therefore, the rationale for the interview protocol, as approved by the IRB, informs the client organization of the interview procedures, the voluntary nature of the study, the risks and benefits of the study, privacy surrounding recordings, transcripts, reports, publications, and presentations to uphold research ethics standards of the IRB and US federal regulations regarding the protection of human research participants as well as research integrity.

In addition, an SOA was executed using the approach of business scholar-consulting. It included the evaluation and effectiveness of identified outcomes for the organization in implementing BEF criteria, and a redacted version is provided in Appendix A. Developing and recommending strategic interventions for actionable feedback ensures the organization's success, now and in the future. In business administration, compliance with all international ethical obligations is overseen by the IRB, and requirements ensure privacy, confidentiality, and anonymity. The relationship between the business scholar-consultant and the organization was maintained with a valued demonstration of integrity, scholarship, and a focus on honesty, openness, and collegiality.

Four Principles of Data Collection

The four principles of data collection support my ability to address my doctoral research questions through convergence and corroboration while creating versatile

methodological connections, maximizing the connections from the six sources of evidence. The six sources of evidence include 1) documentation, 2) archival records, 3) interviews, 4) direct observations, 5) participant observations, and 6) physical artifacts (Yin, 2018). Further, Quintão et al. (2020) indicated that evidence chaining and procedural rigor are completed through the application of multiple data collection principles. Therefore, triangulating multiple sources of evidence during data collection build validity and reliability.

This single case study incorporated evidence primarily from semistructured interviews to enhance the credibility of the representation of participant data. A range of techniques was applied to ensure credibility and internal validity, including a) the development of the scope of the project and research involvement to ensure trust and rapport for sufficient collection of data, b) the reflection of and discussion of strategies and findings, c) the analysis of data refinement to produce the best possible explanation, d) data analysis and interpretations, and e) through expectations surrounding privileged confidentiality (Saunders et al., 2020). In addition, dependability was centered around reliability in recording all project changes to produce emerging research that may be of interest to be evaluated by new researchers. Furthermore, data validation, such as triangulation and participant validation, was utilized.

Utilizing multiple sources of evidence is called triangulation and ensures and confirms the validity, credibility, and authenticity of data. The triangulation also includes participant validation, in which research is sent back to the participant to confirm its accuracy, comment on or correct it, and ultimately validate and confirm the data

collected. The participant collaboration process is essential to develop construct validity and confirmability to ensure the results answer the research question. Construct validity refers to the validity of case study construction (Quintão et al., 2020). Quintão et al. (2020) further detailed the complexities surrounding the implementation of the case study, including collection of multiple sources of evidence, data triangulation, review and analysis of data, conduction of interviews, and defining a logical chain between case study inferences and evaluations. Therefore, construct validity is one criterion for judging the quality of data (Yin, 2018) to exemplify the skill and sensitivity of the researcher and ensure that results are of methodological rigor to be accepted in the scientific community (Quintão et al., 2020).

The enhancement of data validity, required multiple analytical techniques to be deployed depending on the objectives of the data, including 1) pattern matching (measures of processes and outcomes or rival explanation), 2) explanation building (measures processes and procedural tracing), 3) time-series analysis (measures data sets over time), 4) logic models (measures complex activity or programs) and 5) cross-case synthesis (analysis of multiple case studies for two or more case studies) (Yin, 2018). Therefore, using analytical techniques of single case study data and evidence ensures validity and reliability to be grounded in logical interpretation (Quintão et al., 2020). The first four techniques are the most relevant. They are utilized within the Results subsection of Section 4, such as with service matching of competitors and measured maturity stages through procedural tracing of Baldrige data.

There are four types of data triangulation and its applicable relationship to data quality. The four types of triangulating methods stem from 1) data, 2) investigators/evaluators, 3) theory, and 4) methodologies (Yin, 2018). Triangulating data on the same research question improves and strengthens construct validity. Construct validity is a relevant criterion for judging the quality of research design and is one of the four logical tests; the remaining three tests include internal and external validity and reliability (Yin, 2018, p. 42). In addition, Quintão et al. (2020) indicated that reliability is demonstrated through data triangulation and is fundamental to methodological research rigor. Therefore, a triangulated research strategy consists of many components, including the four principles of data collection, six sources of evidence, four types of data triangulation, and four logical tests.

Data Organization and Analysis Techniques

The data analysis processes included qualitative data analysis, such as data reduction, display, and coding. Data coding consisted of categorizing literature. Saldaña (2021) indicated that code mapping and landscaping are manual techniques for qualitative data display to enhance credibility, trustworthiness, and organization through a series of cycles. The coding process goes through stages or cycles, from initial categorization and is subdivided and refined into subcategories under primary topics. As Anfara (2008) described, the cycles progress to bring meaning, structure, and order to data. For example, the first cycle of data coding of literature lists every subdivided topic; the second iteration places categorical labels, and the third iteration of code mapping reduces the categorical content to the main summarization. As Saldaña determined, the

fourth iteration serves as an auditing process for all categorization, recategorization, and conceptualization. In addition, code landscaping is utilized to determine the most salient words to identify themes, concepts, and categories through the use of internet tools to spatially outline categories, subcategories, and sub-subcategories through the deployment of word cloud graphics for data visualization.

The application of data reduction included retaining only highly relevant literature to the doctoral topic, and reduction encompassed removing nonapplicable details and refining written content. Data coding within the doctoral project consisted of grouping primary topics and subtopics per subject category and giving those subjects a heading with refinement to the main content summarization. The auditing process continued with data reduction and streamlined conceptualization of content matter expertise. Lastly, code landscaping further divided and summarized topics and subtopics under a primary group such as “Innovative Growth Solutions.” Moreover, all data within the doctoral project was used for qualitative analysis, including the semistructured interviews in which raw data will be stored securely for 5 years.

The methodological triangulation of data across each category from data collection ensured construct validity to promote research design quality and justification of design choice that best assisted in the data collection to answer the research question. Triangulation occurred across various research sources that contributed to the evidence-based synthesis of concepts demonstrating the depth of knowledge supported by the peer-reviewed work. Furthermore, classic data analysis methods included mind mapping to critically analyze the data by clustering concepts and ideas. I further analyzed the

identification of themes in correlation to the project topics via qualitative software.

Finally, references for supporting scholarly peer-reviewed and seminal resources that were selected and critically analyzed were collected and organized within Zotero, an open-source research tool for referencing sources.

Additional data analysis included benchmarking the client's results per each Baldrige category to apply transparent and compelling results reporting and interpretation depending on the organization's performance and maturity levels. Measurement and analysis of qualitative data sets were conducted through Excel to provide enhanced data analysis, insights, and understanding of research findings with clear visualization and summarization through data science. Measurement of nominal, ordinal, and interval data across the categories for any given situation incorporated the Baldrige framework assessment to accurately and efficiently gauge each of the six category topics and incorporate each subtopic. Results of each category and a summarization of key findings are presented in Section 4.

Reliability and Validity

Achieving Reliability and Validity

There are four core tests for the judgement of research quality. Construct validity is a relevant criterion for judging the quality of research design and is one of the four logical tests; the remaining three tests include internal and external validity and reliability (Yin, 2018). However, one way of achieving reliability and validity is through data saturation, which may differ depending on the type of methodology. For example, with quantitative research, validity is achieved through statistical sampling; however, for

qualitative research, validity is ensured through data saturation (DBA consulting capstone doc study research handbook, 2023). Therefore, achieving data saturation occurs when new information is no longer feasible and enough information has been reached to replicate the study; therefore, full data saturation, including triangulation of sources, ensures that validity and transferability are fully enhanced (Fusch & Ness, 2015).

Semistructured interviews are used in this case study to guarantee the validity of participant data. Project scope development, strategy discussions, data interpretation, data refinement, and confidentiality maintenance are some techniques used. Reliability is prioritized, and project modifications are documented for later assessment. The data are validated using techniques like participant validation and triangulation. These precautions guarantee rapport and trust, which facilitates gathering adequate data and new research.

Complete data saturation is ensured when limits are reached through the triangulated research strategy consisting of the principles of data collection, sources of evidence, types of data triangulation, and logical tests. Numerous analytical methods, including pattern matching, explanation construction, time-series analysis, logic models, and cross-case synthesis, are applied to guarantee the validity of the data. These first four methods work best with single case study evidence, like rival service matching and measured maturity stages using Baldrige data procedural tracing. These methods are applied in Section 4's Results subsection. Moreover, achieving data validity, reliability, and generalizability can equate to truthfulness, consistency, and transferability (Slevin & Sines, 2000). In summary, whether it is constructing validity, internal and external

validity, or reliability, these four logical tests for judging research quality depend upon the research methodology and phases of research.

Importance of Reliability and Validity

For qualitative methods, the measurement and application of validation and reliability are more complex to demonstrate than quantitative methods. More specifically, parallel versions of quantitative measures of quality for internal and external validation were formulated for that reason by establishing authentic qualitative assessment criteria. In contrast, dependability equals reliability, credibility equals consistency (internal validity), and transferability equals generalizability (external validity) (Lincoln & Guba, 1985). Moreover, Saunders et al. (2020) indicated data triangulation and participant validation are techniques to verify, interpret, and establish validity, credibility, and authenticity. Bougie and Sekaran (2020) determined that by enhancing the sophistication of case study design through the reduction of external threats to validity, the level of researcher bias is reduced, and internal and external validity is improved. In summary, qualitative researchers are tasked with authoring individually trustworthy and authentic research literature.

Researcher Rigor and Credibility

It is essential to distinguish between the researcher's characteristics and the research itself and the rigor and credibility of the study, whereby some publications may be plagiarized replications of another researcher's work and have significant legal ramifications for the falsifications of that study. For instance, Johansson Westholm and Månsson (2022) have promoted the importance of ethics within research studies by

focusing on the notable misconduct examples that had occurred by other researchers, such as induced harm during field experiments, failure to obtain consent, conflicting interests, plagiarized works, fabrications of results, distortion of data and manipulated figures, negligence in the ethical vetting of subjects and negligence in the use of ethical practice. Awareness of ethical research issues allows for intellectual independence and responsibility for ethical conduct, including conscious effort and rigor of ethical integrity in publishing qualitative literature (Johansson Westholm & Månsson, 2022).

Additionally, I am required to remain compliant with research ethics under Walden University's Office and Research Ethics and Compliance (OREC); for quality assurance and improvement, the OREC monitors compliance to a) university policies, b) federal, state, local, and international laws and regulations, c) requirements of funders or community research partners, d) participant safety provisions, e) standards of data integrity, and f) procedures of participant recruitment and data collection to ensure compliance (Harris, n.d.-a). Therefore, the analysis of research integrity, including validity and credibility, is an important aspect to develop for the ethics submission, review, feedback, and final application approval, beginning with the data source descriptions (Harris, n.d.-b). In summary, doctoral researchers should remain compliant with ethical considerations of their research to ensure the overall validity and credibility of their work.

Reaching Data Saturation

Member checking can enhance the richness of the data; furthermore, single phenomenological study may incorporate a minimum of 20 participants, whereas single

qualitative case studies may reach full data saturation with just a few participants; quality-rich data is more critical than quantity-thick data (DBA consulting capstone doc study research handbook, 2023). Data saturation ensures accuracy and validity, with no direct correlation between data saturation and the sample size. Indeed, reaching data saturation will vary by design, yet acquiring enough participants to produce quality-rich data is essential. Therefore, I reached data saturation when the maximum amount of quality-thick data was produced and was pervasive throughout the doctoral study.

The process of member-checking is known as participant collaboration. In contrast, the process of ensuring and verifying validity, credibility, and authenticity of data by using several sources of evidence is data triangulation. In addition to the triangulation process, participant validation involves returning research to the participants to verify its accuracy, update any corrections needed, and ultimately validate and confirm the data collected as true and correct to the best of one's knowledge. In order to ensure that the findings address the research question, the participant collaboration process is crucial for developing construct validity and confirmability. Therefore, the final stage of the doctoral project encompassed a full review of the single case study with the client organization, and any revisions for accuracy were made before a final presentation was prepared for public publication.

Therefore, complete validity and transferability are guaranteed by data saturation, and research credibility and rigor are crucial elements of research integrity. Complete data saturation is ensured when limits are reached through the triangulated research

strategy consisting of the principles of data collection, sources of evidence, types of data triangulation, and logical tests.

Research Transparency

Reliability and validity of research are obtained through transparent research. Aguinis et al. (2024) indicated that transparency in research is essential to creating reliable and reputable theories, procedures, and policies. Also, along the lines of transparency and validity is research integrity. Promoting research rigor, excellence, and integrity through researcher leadership practices must integrate with managing limitations to provide compelling interpretations and implementation of strategic oversight (McIntosh et al., 2020). A humble presentation of findings (Beck, 2021) is reflected in the researcher's research as qualitative researchers are inclined to produce transparent, valid, credible, and trustworthy research to ensure integrity and dependability for other researchers who may also rely on our research to support theirs. I have ensured transparency within my doctoral study by demonstrating integrity, validity, trustworthiness, and confidence in research. In my capacity as a doctoral researcher and scholar-consultant, I have worked to demonstrate my research competency and leadership through in-depth study and development in order to fully articulate an explanation of the project's purpose and business problem clearly and succinctly, making sure that all of the content is original and compliant with ethical standards.

Data Triangulation for Research Authenticity

For qualitative methods, the measurement and application of validation and reliability may be more complex to demonstrate than quantitative methods. Moreover,

Saunders et al. (2020) indicated that data triangulation and participant validation are techniques to verify, interpret, and establish validity, credibility, and authenticity.

Research authenticity combines rootedness, uniqueness, and self-connection (Krause et al., 2024), in which the rootedness of research is grounded in the philosophy of science and methodological research methods. In summary, qualitative researchers are tasked with authoring individually trustworthy and authentic research literature.

Researcher Debiasing Strategies

Researcher bias within qualitative methodology is reduced with debiasing strategies. As an example, Doherty and Carroll (2020) mentioned that medical professionals can portray cognitive biases, including confirmation bias, anchoring bias, affect heuristic bias, and outcome bias, which can contribute to both diagnostic and treatment errors; however, debiasing strategies include awareness, recognition that error is not inevitable, and remain open to solutions for reducing bias. Further, the APA's Ethical Principles of Psychologists and Code of Conduct (2023) requires that potential biases, boundaries of competencies, and limitations of expertise do not lead to or condone unjust practices. Awareness of research bias and debiasing strategies can improve the overall reliability and validity of one's research practices; therefore, I have ensured the credibility of my doctoral research through the minimization of biased research and have incorporated debiasing strategies to ensure the ethical application of research.

Transparency and research integrity are essential to achieve validity and reliability through debiasing in qualitative studies. Being transparent means that the research's goals, objectives, and assumptions are reflected in the communicated findings. However,

decision-making confidence and trustworthiness are essential components of research integrity. Qualitative researchers should produce transparent, valid, credible, and trustworthy research to ensure dependability for other researchers. Through extensive qualitative analysis, I exhibit research competency and integrity as a doctoral researcher.

Complete data saturation is essential through data triangulation and confirmation to guarantee validity and accuracy in research. Complete validity and transferability are guaranteed by data saturation, and integrity requires the validity and rigor of the research. Participant validation is a step where participants confirm that the research is accurate. The doctoral project concludes with a thorough review conducted in collaboration with the client organization. Any necessary corrections are made prior to public release. This procedure guarantees that the data are valid, rich, and accurate.

Transition and Summary

This research project is in compliance with the *Belmont Report* protocol and IRB ethical guidelines for doctoral studies to protect participant confidentiality and data privacy. I employed a single case study methodology to address a consulting firm that excels in strategy and performance. Confidentiality was maintained through collection of data via semistructured interviews, organizational data, documents, and archival records. Construct validity was essential for assessing outcomes, and four data collection principles were used to improve validity and reliability.

I had a business scholar-consultant relationship with the organization and made sure to adhere to international ethical standards. Qualitative data analysis involved data reduction, display, coding, code mapping, and landscaping to boost credibility and

dependability. Information was determined by benchmarking clients' results using the BEF. The four main tests of validity and reliability are construct validity, internal validity, external validity, and reliability (Yin, 2018). Complete validity and transferability were guaranteed by data saturation. The OREC at Walden University mandates researchers to follow moral guidelines and understand moral dilemmas. Reliability and validity of research depend heavily on methodological integrity and transparency.

In Section 4, I begin with an organizational profile of the BEF. I identify, assess, and improve critical aspects of business, including strategy, leadership, customers, workforce, operations, and results, as well as measurement, analysis, and knowledge management to increase success involving job creation and opportunities, cost savings through process and performance improvements, increases in total gross profits, outperformance of competitors, national quality benchmarks and awards, and increases in customer and client satisfaction through a systems-perspective approach.

Section 4: Research Project Findings and Professional Conclusions

The purpose of this qualitative single case study was to identify and explore effective international diversification strategies senior leaders can use to create a franchise or growth platform for organizational expansion. I focused on expanding a company's workforce in order to attract new clients. Results show how effective initiatives can improve workforce capabilities as small business owners often find it challenging to oversee additional regulations to comply with when onboarding employees due to time and budgetary constraints. Therefore, one way to mitigate employee risks, diversify labor, and expand operations without compromising current capacity is through franchising. I aimed to identify workable strategies for helping small business owners create an international franchise or growth platform. Important considerations include which market to enter, how to integrate franchise modeling, availability of capital, and the role of franchise consultants. I identified four themes: effective operational procedures, research and development on risk and emergency responses, high-performance industry leadership, and innovative action plan formulation for holistic energy enhancement and performance maximization.

Organization Profile

The organizational profile is a strategic starting point for assessment and writing BEF applications that are critically important to identify topics for action planning. The Baldrige Builder provides a context for understanding organizational operations and enables companies to address unique aspects of leadership, strategy, customers, measurement, analysis, and knowledge management, workforce, operations, and results.

Baldrige criteria were used to determine gaps in order to focus on performance requirements and results.

The consulting firm has various service segments including: purpose-led governance, leadership and culture, and transformative recruiting. Purpose-led governance involves strategy development, business plan development, board appraisals, governance reviews and coaching, and culture development. Leadership and culture includes services such as one-on-one coaching, group coaching, conflict resolution, team building, and culture development. Transformative recruitment services include executive searches, governance recruitment, restructuring, and everyday vacancy filling.

Organizational Description

The organization in this study is an international consulting firm with a focus on high performance strategies for its clients with purpose-led governance. Effective governance through inspiring purpose and strategy to harness and direct organizational capabilities has the greatest impact on businesses and resources in terms of goal achievement and underscores the purpose of the firm. My purpose was to identify and explore effective international diversification strategies senior leaders can use to create a franchise or growth platform for organizational expansion.

Organizational Environment

The organizational environment incorporates purpose-led governance, leadership and culture, and transformative recruitment as the foundational basis for leading high-performance strategies to promote innovation and growth.

Product/Service Offerings. There are currently no product offerings as this organization is service-oriented. Main consulting services include specialization in strategic planning, business planning, executive coaching, and recruitment. The main offering is strategic advice and facilitation. In addition, executive coaching to help shape leadership teams is provided. Service orientation involves high-performance consultations and 1:1 coaching and client-led briefings with meetings 2 days per week for each client. The relative importance (including the percentage of revenue/budget) of each product or service to the organizational success includes the delivery methods of these services – primarily workshops or 1:1 sessions in person or online, and diverse service offerings that are all under high-performance attributes, contributing to near 100% of all revenue.

Mission, Vision, Values and Culture. The organization aims to “transform the human experience through being bold, curious, connected, and authentic.” The organization’s vision is to transform human experiences; values are curious, connected, strengths-based, and deficit-free. Currently, there is no official mission. The organization’s core competencies, in relation to the mission and vision include strategic planning, personal development, and high-performance.

Workforce Profile. The current workforce comprises two directors, who are the owner and co-owner. The organization seeks consultants, coaches, human resource personnel, and coordinators. Participants mentioned spending more time with their children and families, developing property, and influencing work to continue to do more and more deliberately.

Assets. Along with the major assets of intellectual property, minor assets include cars, laptops, and mobile devices.

Regulatory Environment. Owners of the consulting firm also operate additional businesses. There are no health or safety regulations for the consulting firm and no product regulations; however, there are ethical requirements and government regulations to comply with.

Organizational Relationships

Organizational Structure. This organization is a limited company. Key components of the organization's leadership system are currently undefined.

Customers and Stakeholders. Key market segments, customer groups, and stakeholder groups are diverse. Key requirements and expectations for products or services, customer support services, and operations include differences among groups that are too diverse to know; however, the market niche includes government clientele and community give-back initiatives through CSR.

Suppliers, Partners, and Collaborators. There are currently no suppliers and no supply chain requirements as well as no additional investor relationships.

Organizational Situation

Expanding owner capacity will be prioritized through expanding operations to include additional professionals while maximizing economies of scale for production and achieving performance excellence. This involves developing and deploying effective international diversification strategies to create franchises or growth platform for global organizational expansion. Again, the purpose of this proposed qualitative single case

study was to identify and explore effective international diversification strategies senior leaders can use to create a franchise or growth platform for organizational expansion, specifically, a consulting firm seeking to diversify its operations within geographical territories of the United States and NZ.

Competitive Environment

Competitive Position. The organization operates as a small company with two owners. Quantity and competitors are plentiful, though they are not seen as competitors. The organization demonstrates strengths in terms of past successes and their impact on company leaders. The organization's size, share, and growth in the market that it services is too diverse to know, and key markets, customer groups, and stakeholder groups are also highly diverse. The expectations from these markets and groups are, again, highly diverse, and do not directly contribute to implementing innovations in the organization, however, these markets and groups indirectly contribute to learning-through-delivery.

Competitiveness Changes. The key changes that affect the competitive situation, including changes that create opportunities for collaboration and innovation are market specific. The economic standpoint (in New Zealand) is in a technical recession with inflation leveling, however, the Official Cash Rate (OCR) remains high, and the construction industry is in flux. Online influencers affect business operations as individuals assume help for no cost and assume their circumstances are fixed with no direct intervention.

Comparative Data. There are little to no key sources of comparative and competitive data available internally or externally within the industry and there are

currently no limitations that affect the organizations' ability to obtain or use the data due to the industry.

Strategic Context

The key strategic challenges for the organization consist of a) time for the business owner and the client, b) company budgets, and c) no pipeline of talent within the company. The key strategic threat is the economy, while key strategic advantages are the current client base and company identity. The key strategic opportunities are a) diversification and b) developing systemized approaches.

Performance Improvement System

The organization's current overall system for performance improvements consists of feedback. The key tools and methods that are used as part of this system include face-to-face meetings. Through the implementation of the BEF and obtaining performance excellence recognition, the financial rewards of such are extended through to the stakeholders as the Baldrige excellence framework is realized and implemented within the consulting firm.

Leadership, Strategy, and Customers

Leadership

Senior Leadership

Focus on Vision and Values. Senior leaders set and deploy the organization's mission, vision, and values through 12-monthly director meetings to review its mission and values for fit-for-purpose, and to live them in each interaction and on social media

interactions. The vision and values align with the director's personal values for who they are as business owners and are reflected in their communication, operations, and delivery.

Leadership and Ethical Behavior. The organization leaders demonstrate a commitment to legal and ethical behavior by not having a specific outcome in mind when coaching their clients; the consultant is led by the leader he is coaching, and client information is held confidential. Further, the directors sign non-disclosure agreements (NDA) for new clients which establishes a legally binding and confidential relationship between each party. Leadership is further demonstrated through living their values.

Communication and Engagement. Senior leaders preferably interact in person, over the phone, via text, email, and with the client's workforce, essential partners, and key customers. The clients appreciate the senior leaders' warmth and friendliness.

Environment for Success. The organization leaders create an environment for success by doing well for existing clients and obtaining referrals while maintaining a reasonable workload to deliver for clients in addition to staying up to date on industry trends. Further, success is created through setting clear expectations, living those expectations, and providing resources and tools necessary to perform the roles. The organization leaders consider creating an environment for success to be of high importance. An example of this is demonstrated through capping capacity; if the four large clients under contract provide 40 hours per week, then additional clients are not sought due to capacity. In addition, success is achieved through backing the organization if the client limits involvement, in which other work is obtained or referred. At this time, 75% of current business is referral-based.

Focus on Action. A focus on action to achieve the organization's mission and vision is through creating strong relationships and having accountability of deliverables.

Governance and Societal Responsibilities

Governance and Performance. The organization leaders ensure responsible governance through ongoing learning in governance, and through our governance coaching approach to up-skilling. The organization leaders currently do not self-evaluate the performance and governance of its directors.

Legal, Regulatory, and Community Concerns. Anticipation of future concerns are to remain connected to networking, tracking trends, and promoting ethical behavior through clear expectations, in addition to ongoing up-skilling.

Ethical Behavior. The organization leaders foster ethical behavior in all interactions through a new approach of gathering client feedback at a 3-month mark and 6-monthly ongoing. The values and expectations also ensure ethical behavior.

Societal Wellbeing and Community Support. The organization leaders incorporate societal well-being and benefits into daily operations by prioritizing work and family time when required and having an open-communication culture. The organization leaders actively support and strengthen key communications through volunteership of time and charity to enable community outcomes through individual evolution.

Strategy

Strategy Development

The development and conduction of strategic planning occurs annually off-site for one day and is self-facilitated. The collection and analysis of relevant data and

development of information for use in the strategic planning process is considered through the economy, client's needs, themes from delivery, and sector trends. The identification of strategic opportunities and stimulation of innovation occurs through reviewing themes from clients and foreseeing future needs in a current reactive state with intentions on being more initiative-taking. The decision-making surrounding key processes is currently not a priority via the workforce, external suppliers, partners, and collaborators. The organization's key strategic objectives and most important related goals include living a purpose of transforming the human experience; to be profitable, to make an impact, and to be referred. The strategic objectives in achieving balance among varying and competing organization needs is focused on prioritizing impact.

Strategy Implementation

The development of action plans is not currently an internal function of the organization, rather action plans are facilitated for the client. The development and deployment of an internal action plan presents an opportunity to be created (i.e., the BEF). The assurance that financial and other resources are available to support the achievement of the actions plans while meeting current obligations consists of positive business cash flow and property investments. The key workforce plans to support the strategic objectives and actions are currently none. The key performance measures or indicators that are used to track the achievement and effectiveness of the actions are also currently none. In addition, the short- and long-term projections surrounding the key performance measures or indicators are also currently none. The recognition and response to circumstances requiring a shift in action plans and rapid execution of new plans

consists of remaining agile and without plans, adapting very easily, however, the creation of a strategic action plan for the organization is desired at this time.

Customers

Customer Expectations

The organization leaders listen to, interact with, and observe clients', to obtain actionable information actively and with feedback throughout. Curiosity and probing questions get to the real issues and opportunities, in a collaborative nature. The organization leaders consistently listen to potential clients to obtain actionable data and information. Client groups and market segments are determined through the same values for any client who wants to do more and be more; segments are broad due to service offerings. The determination of product or service offerings are consistent to the organization's strategy and will remain the same. The next priority area for growth is recruitment.

Customer Engagement

Customer-client engagement is built and enhanced through customer experience. By having effective relationships and delivering to their expected outcomes, clients are acquired and retained. By being available at any time and being responsive to queries and needs, clients are enabled to do business with the organization, to seek information, and to obtain support. While there have been no customer-client complaints, management of them would be the same as the relationship and approached in an open and honest dynamic, with a plan for enhancement. The customer experience processes promote and ensure fair treatment for different customers, customer groups, and market segments by

implementing core values. Fair treatment is not a priority, however, client-specific treatment to the needs of the customers is prioritized as everyone is different. Customer satisfaction, dissatisfaction, and engagement is determined through asking clients on a quarterly basis for feedback and reviewing engagements for effectiveness.

Measurement, Analysis, and Knowledge Management

The foundation of the Baldrige systems perspective is measurement, analysis, and knowledge management. Information in this section is critical to effective management and leadership, and to a fact-based, knowledge-driven, agile system for improving performance and competitiveness. By describing processes for measurement, analysis, and knowledge management the leadership triad and the results triad is supported.

Measurement, Analysis, Review, and Improvement of Organizational Performance

The organization tracks data and information monthly on daily operations and overall organization performance. The performance is financial, totaling invoices and weekly hours in a manual and qualitative method. The selection of comparative data and information that supports fact-based decision-making is through industry forums, credible publications, and from trusted advisors. The analysis and review of organizational performance and capabilities is surveying clients for feedback. The use of the findings from performance reviews to develop priorities for continuous improvement and opportunities innovation is currently not implemented.

Information and Knowledge Management

The organization currently does not have a formal process for verification and assurance of the quality of organizational data and information; however, availability of

organizational data and information is through cloud usage. The cloud is also utilized to secure sensitive or privileged data and information, information technology assets, and internet-enabled systems. The organization would like to improve its approach to building and managing organizational knowledge through documentation. Identification and sharing of organizational best practices are currently ad-hoc, and an area for improvement as well. The determination of which opportunities for innovation are to be pursued include intuition, experience, and data.

Workforce

Workforce Environment

The organization currently does not assess workforce capabilities or capacity needs. The organization currently does not recruit, hire, or onboard new workforce members. The organization currently does not prepare the workforce for changing capability and capacity needs nor does it organize or manage a workforce. However, the organization addresses workplace health and accessibility by being flexible to the needs of clients by responding promptly. Further, compensation and benefits are supported through the initiatives and needs of our people proactively and responsively.

Workforce Engagement

The organization currently does not determine the key drivers for workforce engagement and does not assess any workforce engagement. However, the organization fosters an organizational culture characterized by open communication, high performance, and engaged customers through setting and reinforcing the purpose and values at every opportunity. Further, there is currently no workforce performance

management system supporting high-performance nor learning and development systems to support personal development of workforce members or organizational needs. Further, there is no career development path established, and there is no adaptation required for promoting equity and inclusion for a diverse workforce for different work groups and segments to ensure performance management, performance development, and career development processes. To reiterate, the organization operates with two directors in a joint partnership and does not require a workforce at this time to maintain successful operations.

Operations

Work Processes

The organization leaders determined and designed vital products or service requirements based on the directors' capabilities. The organization leaders determined and designed key work processes and supported process requirements based on good practice and pre-set expectations. Further, day-to-day operations of key work and support processes are ensured to meet requirements and are proven with a range of clients that have given positive feedback. Based on client feedback and industry best-practices, key work and support processes improve product or service process performance.

Operational Effectiveness

The organization leaders manage operational costs, efficiency, and effectiveness through prioritizing activities and expenditures to elevate the purpose and values. In addition, effective calendar management is critical. Currently, there is no management of a supply network as suppliers are not utilized within the consulting industry. The

organization leaders provide a safe operating environment through setting clear expectations and aligning them to legislation as required. Further, the organization leaders anticipate, prepare for, and recover from disasters, emergencies, and other disruptions in which recovery is based upon cloud services with a simple business objective: to be the response others seek to recover from such events. Lastly, the organizational approach to risk management is to have a range of clients and diverse income streams.

Project Results

Results is the last final section in the BEF that encompasses a comprehensive review of (a) services and processes, including operational performance and service quality and value; (b) customer-focused performance; (c) workforce learning, production, and engagement; (d) leadership and governance; and (e) financial, marketplace, and strategy sustainability and marketplace achievements. The systems-focused emphasis on Results, as indicated in the “Baldrige Criteria Commentary” (2016), will be placed on the superior value of offerings in the customer's view and on the superior organizational performance based on operational, organizational, and workforce learning indicators, to evaluate, improve, and innovate services and processes for measuring and monitoring predictors of future performance.

Each result category will include (a) identification of relevant findings and themes from data analysis with examples from the data supporting the findings; (b) a description of the ways that findings confirm, disconfirm, or extend knowledge in the discipline; and (c) findings and results analysis in correlation to the conceptual framework. For the

purpose of identifying and measuring results, qualitative benchmarking will be utilized across the categories where appropriate and will incorporate BEF assessments to accurately and efficiently gauge each of the six category topics and will incorporate various subtopics within. Once each category is benchmarked to the pre-determined reference points, a key findings summarization will be presented. Furthermore, a holistic assessment and evaluation of results utilizes four results factors: 1) levels, 2) trends, 3) comparisons, and 4) integration (LeTCI) of organizational outputs. Outcomes are utilized to assess performance of results with these four factors.

Product and Process Results

Senior Leadership and Governance and Societal Contributions

Product/Service and Process Results are top performing with fully integrated approaches towards strategic and operational goals in a role model fashion. Key organizational aspects include an effective, systematic approach, that is fully responsive and fully deployed without significant weakness or gaps in any areas or work units. The approach is well integrated and fact-based; systematic evaluations and refinements are adopted for best practices in which innovation is a key tool for improving efficiency and effectiveness.

Development and Implementation

Development and Implementation are also top performing with fully integrated approaches towards strategic and operational goals in a role model fashion. Key organizational aspects include an effective, systematic approach, that is fully responsive and fully deployed without significant weakness or gaps in any areas or work units. The

approach is well integrated and fact-based; systematic evaluations and refinements are adopted for best practices in which innovation is a key tool for improving efficiency and effectiveness (see Figure 1).

Figure 1

Percentage of Total Action Plans in Last 12 Months



Process Effectiveness and Efficiency

Process Effectiveness and Efficiency are also top performing with fully integrated approaches towards strategic and operational goals in a role model fashion. Key organizational aspects include an effective, systematic approach, that is fully responsive

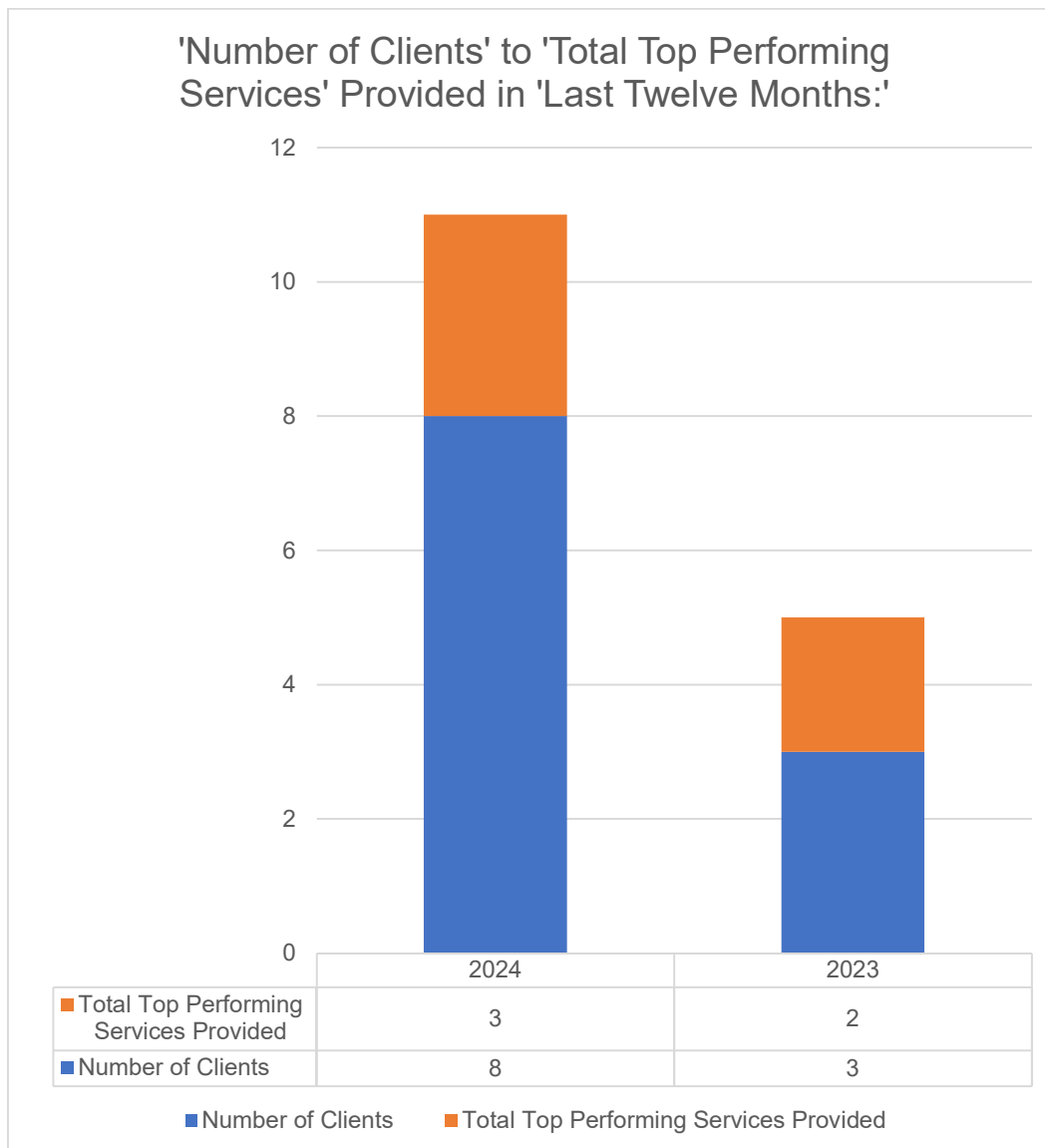
and fully deployed without significant weakness or gaps in any areas or work units. The approach is well integrated and fact-based; systematic evaluations and refinements are adopted for best practices in which innovation is a key tool for improving efficiency and effectiveness.

Customer Results

Customer Results are also top-performing with fully integrated approaches towards strategic and operational goals in a role model fashion. Key organizational aspects for, systematic approach, that is fully responsive and fully deployed without significant weakness or gaps in any areas or work units. The approach is well integrated and fact-based; systematic evaluations and refinements are adopted for best practices in which innovation is a key tool for improving efficiency and effectiveness (see Figure 2).

Figure 2

Number of Clients in Total Top Performing Services in Last 12 Months



Workforce Results

Workforce results include early systematic approaches to aligned approaches for strategic operational goals. Key organizational aspects for an effective, systematic approach is responsive for early stages of deployment in which evaluation and

improvement for key processes is evident. The sharing of refinements, best practices, and instances of innovation are in place for improving the efficiency and effectiveness of key processes. The approach for establishing a franchise or growth platform is in the early stages of alignment to the organizational objectives (see Table 2).

The process of franchise development involves several steps, including program customization, sales optimization, expansion strategization, growth modeling, organizational assessments, feasibility studies, network nurturing, and international development. The timeline is 3–12 months to completion, with revenue generation in as little as 90 days. The process includes a franchise feasibility study, strategy development, regulatory compliance, fee modeling, action planning, operations manual development, and training programs. The process also includes creating legal documents, marketing materials, strategic growth planning, stakeholder debriefing sessions, and international entry. The final step involves preparing for the franchise sales process, ensuring compliance with governing bodies.

Table 2*Steps to Franchise Development: Franchise Consulting*

	<i>Firm 1</i>	<i>Firm 2</i>	<i>Firm 3</i>	<i>Firm 4</i>	<i>Firm 5</i>
<i>Objective</i>	Program customization and sales optimization	Development and sales - franchise expansion strategy	Growth modeling	Assessments and feasibility studies for franchise creation	Network nurturing and overseas development
<i>Timeline</i>	3-12 months for full implementation	Revenue generating in 90 days	12 months	Systems review	4-6 months Example: Recruit first franchisee within 12 weeks and second recruit in next 12 weeks, recover cost of development within first 12 months
<i>Step 1</i>	Franchise feasibility study	Development of franchise - feasibility, business model, operations manual, marketing and branding	Operations and procedures discovery	Evaluation of stakeholders, partners and affiliates aspects - systems review and tailored manuals	Strategic planning
<i>Step 2</i>	Strategy development	Regulatory compliance - draft legal documents and disclosures in compliance with state/federal regulations + trademark protection and intellectual property rights	Fee modeling and legal docs	Action planning - operational modeling and financial planning	System development and manuals
<i>Step 3</i>	Operations manual development	Recruitment and support for franchise -	Territory modeling	System development and manuals	Marketing and

	+ training development program	recruitment strategy, marketing/lead generation, training and support programs, franchise coaching/performance management			implementation system
<i>Step 4</i>	Creation of legal documents; marketing materials and planning	Strategic growth planning - optimization of market research for expansions, growth plan, territory mapping and area development, technology implementation	Marketing and launch	Debriefing sessions with stakeholders - corporate structure, importation of brand	Entry into international markets with master licensing as master franchisor
<i>Step 5</i>	Preparation for franchise sales process - state/federal regulation compliance		Recruitment, onboarding, and training	International advising for expansion and entry	

Measurement, Analysis, and Knowledge Management

Measurement, analysis, and knowledge management of organizational performance and organizational knowledge are also top performing with fully integrated approaches towards strategic and operational goals in a role model fashion. Key organizational aspects for an effective, systematic approach, that is fully responsive and fully deployed without significant weakness or gaps in any areas or work units. The approach is well integrated and fact-based; systematic evaluations and refinements are

adopted for best practices in which innovation is a key tool for improving efficiency and effectiveness.

Emphasis is placed on establishing an approach for improving self-auditing evaluations and measurement of organizational performance with incorporation of best practices and integrated innovation to improve organizational efficiency and effectiveness. The BEF is a highly effective tool to measure the categorical aspects and approaches of the organization and its primary objective is to highlight areas of opportunity to improve organizational performance.

Financial and Market Results

Financial and marketplace results are top performing with fully integrated approaches towards strategic and operational goals in a role model fashion. Key organizational aspects include an effective, systematic approach, that is fully responsive and fully deployed without significant weakness or gaps in any areas or work units. The approach is well integrated and fact-based; systematic evaluations and refinements are adopted for best practices in which innovation is a key tool for improving efficiency and effectiveness.

Financial Performance

A determination of financial performance was conducted for organizational resilience and agility. Organizational resilience is the client-organization's ability to prepare for disruptions such as disasters and emergencies in which agile responses for rapid change and operational flexibility are deployed. The client-organization indicated that remaining agile with rapid execution of new plans and assured financial and other

resources are available to support the achievement of action plans while meeting current obligations consisting of positive business cash flows and property investments. Further, the measurement, analysis, review, and improvement of organizational performance consists of performance in a financial management approach (see Table 3).

Table 3*Franchise Fees*

Franchise Fee	Franchise Consultant Fees	Royalty Fees	Marketing Fees	Other Fees	Citations
	\$20,000 to \$50,000 up to \$100,000+	4% – 12% of revenue	Flat fee or percentage of revenue	Expenses, wages, supplies, licenses, permits, maintenance, for 12+ months	(5 Common franchise fees & why you pay them, 2023)
	40% – 50% of franchisor fee with minimum of \$12,000				(Seid & Ainsley, 2011)
\$20,000 to \$50,000, up to \$100,000+ for master franchise		4% to 12% of revenue	2% of monthly revenue		(Libava, 2017)
\$500 to \$50,000+		5% – 9% of gross sales monthly or quarterly	1% – 4% of gross sales		(Anderton, 2018)

In addition, the client organization has seen an increase in revenues and clients over the last twelve months and has increased its top performing services provided. Total gross revenues have increased by 38%, up from 31% in 2023 to 69% in 2024 (see Figures 3-5).

Figure 3

Gross Revenues of Top Performing Services in Last 12 Months

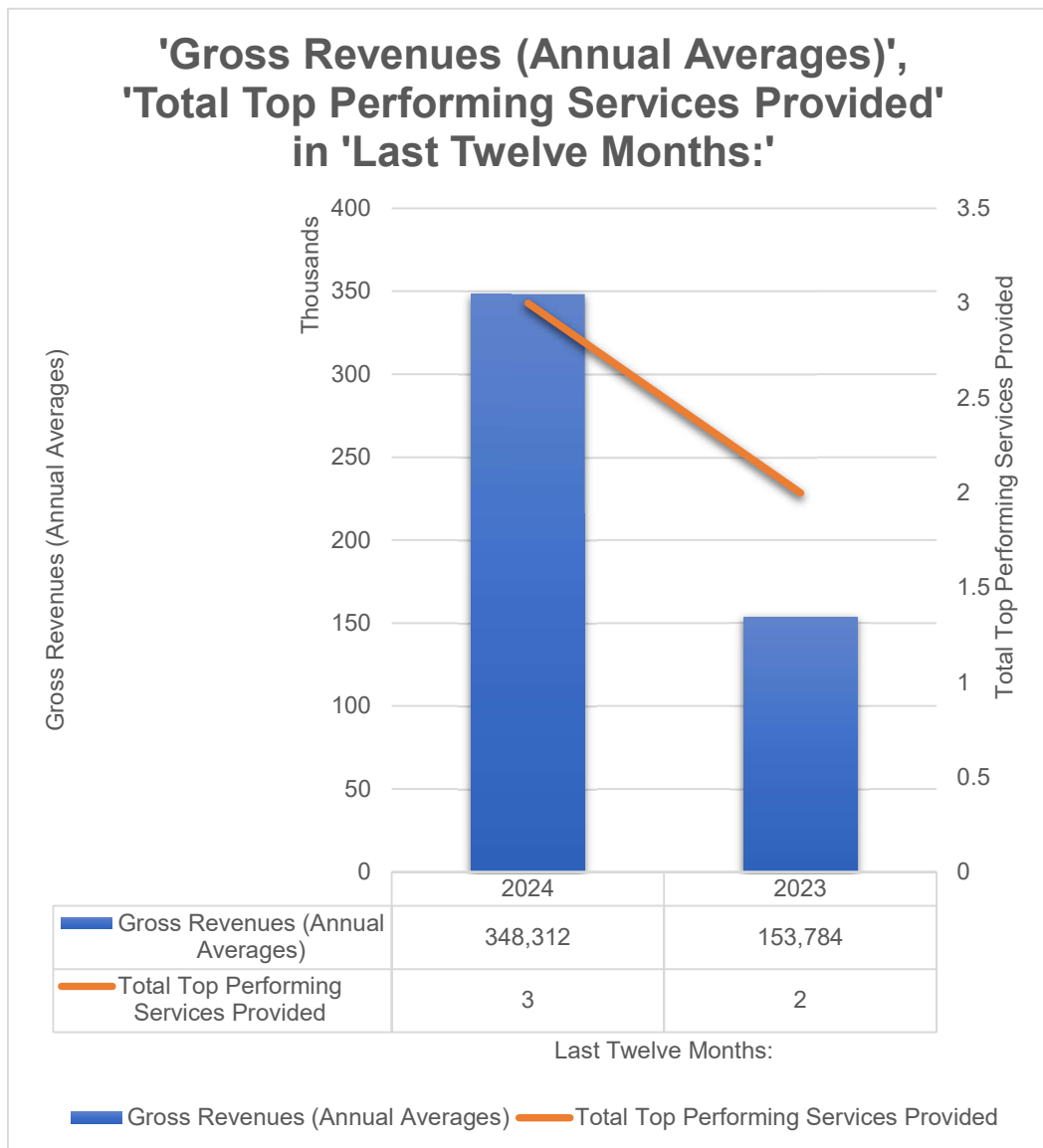


Figure 4

Gross Revenues of Number of Clients in Last 12 Months

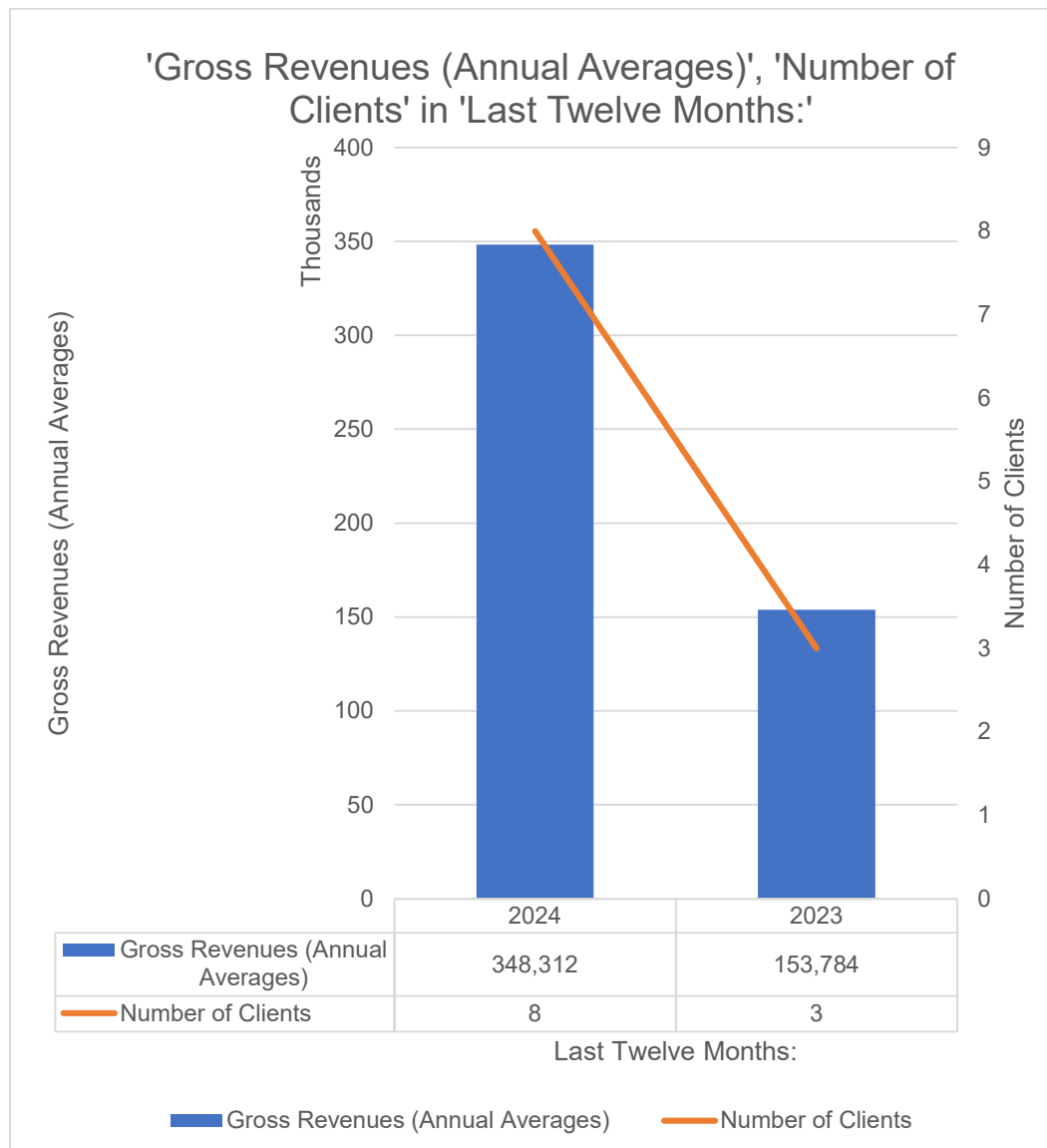
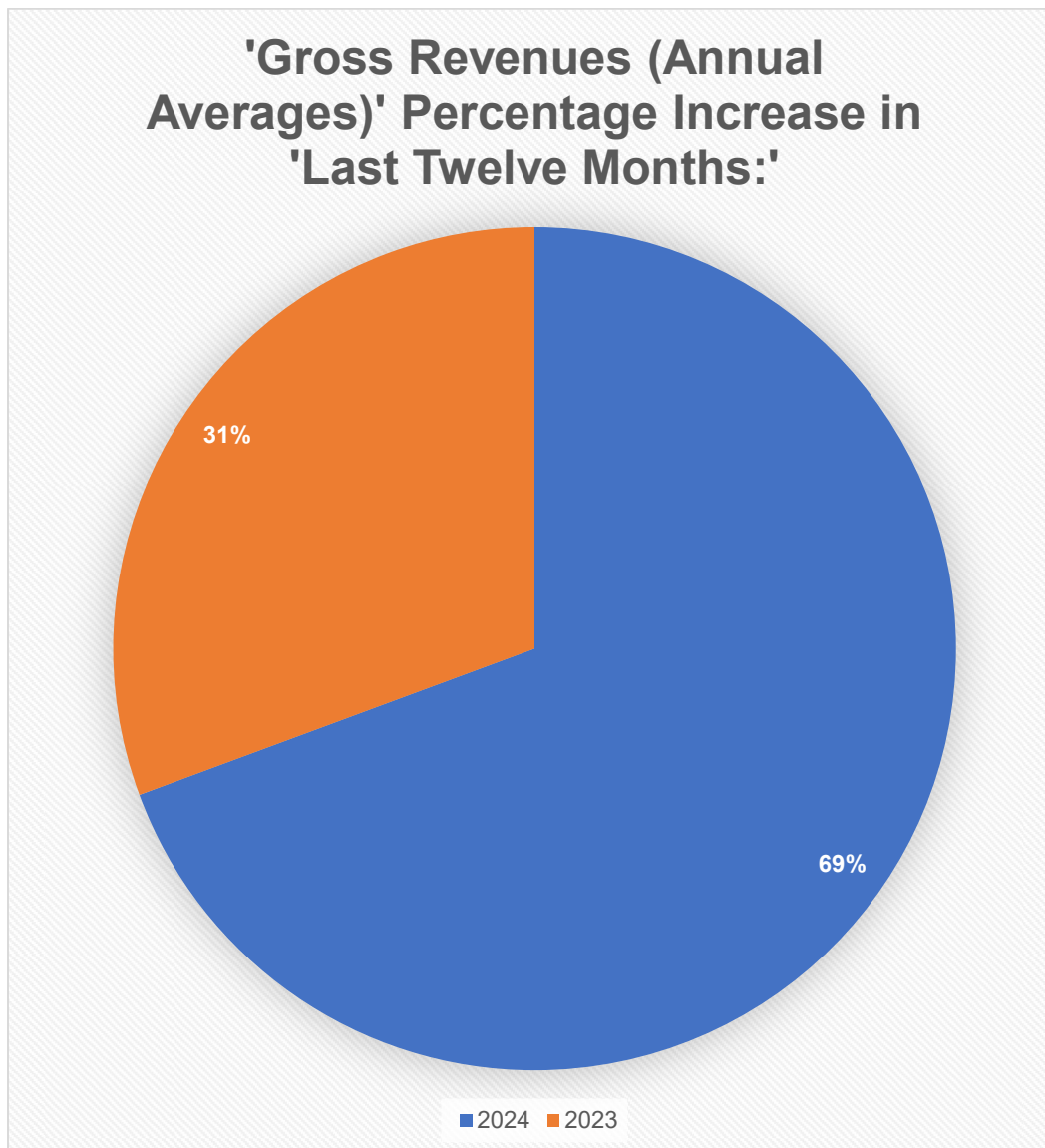


Figure 5

Gross Revenues of Percentage Increases in the Last 12 Months



Marketplace Performance

Table 4 describes services of competing firms to that of the client-organization within the same locale. Competing firms offer strategy consulting, technology strategies, mentoring, engineering, and other services in various industries. They also provide

sustainable environmental services, business improvement, innovation, transformational change, and governance, as well as asset management and coaching. The most similar services to that of the client-organization are provided from Firm 4 in regard to human resource acquisition and leadership mentoring of out 13 total business consulting firms.

A primary theme that occurred over specialized services across all consulting firms is "Strategic Sustainable Development" (SSD), where senior leaders can identify, explore, and create effective diversification strategies using specialized field experts to sustain their organization and improve its operations. The second most common theme that occurred across clientele niches within Marketplace Performance and Services offered is that of "Energy Solutions" (ES), in which the firms readily deliver performance improvement strategies to senior leaders through encompassing "energistic" qualities of operations in various sectors.

Table 44*Services Overview of Local Competitors*

Firm	Specialized Service	Type of Clientele
Firm 1	Strategy Consulting, People and Workforce, Corporate Finance, Assurance, Tax, Technology, Sustainability	Manufacturing, Consumer, Energy, Financial, Government, Infrastructure, Health, Private Equity, Technology, Media, Entertainment, Telecommunications
Firm 2	Land Development and Infrastructure	Home and Communities, Councils, Societies, Agencies, Transportation
Firm 3	Design-Build Technology Strategy and IT Project Management	Automotive and Aviation, Banks, Research Institutions, Insurance Co.,
Firm 4	Consulting, Coaching, Mentoring	Airports, Pharmacies, Councils, Food and Beverage Brands, Not-for-Profits, Colleges
Firm 5	Electrical Engineering Consultants, Asset Management	Sustainable Enterprises - Geothermal/Hydro/Wind/Solar Development
Firm 6	Independent Advisory, Design, and Engineering	Forestry, Oil and Gas, Biofuel/Biochemical
Firm 7	Franchising: Strategy Assessment, Manual Development, Territory Mapping, International Franchising, Licensing	Small-Multi-National: Food/Beverage/Baking Chains, Postal
Firm 8	Sustainable Environmental/Ecological Services	Small-Medium Enterprises: Fitness Centers, Bookstores, Artisan Eateries
Firm 9	Management and Strategy, Business Coaching, Accounting and Finance	Small-Medium Enterprises, NOS
Firm 10	Healthcare Management, Financial Services, Poverty Alleviation Programs	Healthcare Organizations, Governments, Financial Institutions,

Firm 11	Strategic Planning, Business Improvement, CEO & Board Advisory, Interim & Fractional CEO & COO Services	Manufacturing and Product Development
Firm 12	Innovation, Transformational Change, Corporate Restructuring and Turnarounds, Modernization of Data with AI - Hybrid Intelligence	Private and Public Sectors, NOS
Firm 13	Purpose-led Governance, Strategy, Leadership and Culture, Transformative Recruitment and Coaching	Engineering, Transportation, Shipping Ports, Not-for-Profit Charities, Utility Companies

Key Theme Findings

The study focuses on the desire for work expansion in businesses to maximize revenue from labor. Per-worker production, the quantity of labor, and weekly total output can only effectively reach maximum output with additional workers before productivity, performance, and profits decline after maximum output is reached. The Results show that effective, systematic approaches are required for improving workforce capabilities and production. Financial limitations often lead to sole and joint business owners running all aspects of their business, making onboarding employees less ideal due to increased regulatory and budgetary expenses. A more thoughtful alternative to increasing labor output is developing a franchise, which establishes branding, contracts the primary owner's business for-profit, and creates a carbon copy for a franchisee to invest in. This creates a dynamic approach for diversifying the workforce, limiting employee risks, and allowing senior leaders to expand operations while remaining at current capacity.

The cost of drafting and developing a franchise is minimized by the professional franchise consultant. The audience for the answer to the business problem is geared

towards small business owners who wish to diversify their business. Key themes include selecting the right market, replicating the business model, integrating marketing into the business plan, receiving financial support, and using franchise consultants to connect with franchisees for an additional source of revenue. The franchise consultant serves as an intermediary between franchise purchasers and sellers, receiving a commission on the development and sale of the franchise.

The primary key theme finding is that creating a franchise alludes to an exponential growth platform: it is a thoughtful alternative and highly competitive approach to establishing a brand and international expansion by creating a business model for a qualified franchisee to invest in. The return on investment (ROI) for developing the model encompasses the initial franchisee fee (average fee around \$50,000) and royalties (between 4%–12% of gross revenues) with an emphasis on a 10% monthly royalty paid quarterly as a 90/10 split for ongoing use of the model. The deployment of a franchise consultant could have this model developed in as little as 90 days, with up to full international deployment in 12 months. The full table of processes that vary per franchise consultant is included Table 2; however, a summarization of the five main steps to this process is below.

The first step is Franchise Feasibility that involves the development of a franchise, including feasibility analysis, business modeling, discovery of operations, marketing, branding, discovery of procedures, brand building, stakeholder evaluations, and strategic planning. The second step is Strategy Development that involves drafting legal documents for regulatory compliance, trademark protection, intellectual property

rights, fee modeling, marketing and action planning, and system development and manual creation. The third step is Operations Manual Development and Training Programs that involves recruitment, marketing, lead generation, training, performance management, territory modeling, back-end support, and marketing and system implementation. The fourth step is Legal Document Creation and Growth Planning that involves optimizing market research for expansion, mapping territories, implementing technology, marketing and launch, providing international advice, and master licensing as a Master Franchisor. The final step includes franchisee onboarding, training, and recruitment that are all part of the processes of Marketing Materials and Planning.

As indicated by Dick (2024), franchisees need to be highly proficient in all facets of management in order to optimize earnings and leverage their territorial dominance. Remember that since the franchisor's training model focuses on the overall success of the franchisee's operations, owners of a franchise do not always need to be experts in any particular industry. However, it's important to remember that consulting practices are run on the basis of expertise.

Therefore, the client-organization's ideal franchisee candidate, if operating as a reputable and influential franchising entity that models' business consulting concepts and supports international networking, is a professional business consultant. More specifically, the ideal candidate would be someone who lives the client-organization's values with a strong drive to make an impact. Prior experience would be beneficial, though the client-organization would train others to be effective coaches. A mix of

experienced and non-experienced franchisees would be ideal to build on the existing expertise in the wider group.

Moreover, a primary business recommendation is to recruit one franchisee per quarter or four annually. Therefore, the client-organizations acquisition specialist's strategy to recruit, acquire, and train business consultants as franchisees with specialized expertise is a four-step approach being: 1) a curious approach to recruitment that identifies the capabilities and competencies of the person; 2) a connected and ongoing onboarding program; 3) an authentic approach to ongoing development; and 4) a bold expectation for franchisees to develop themselves and each other to create a high-performing team. A theoretical example for cost-benefit analysis to the impact of the 6% investment from one franchise consultant to the return of a team of four franchisees for year 1, would showcase a potential ROI of 94% (see Figure 6).

Figure 6

Percentage of Allocation for Franchise Modeling via the Franchise Consultant for First Year Projected Franchising Revenues

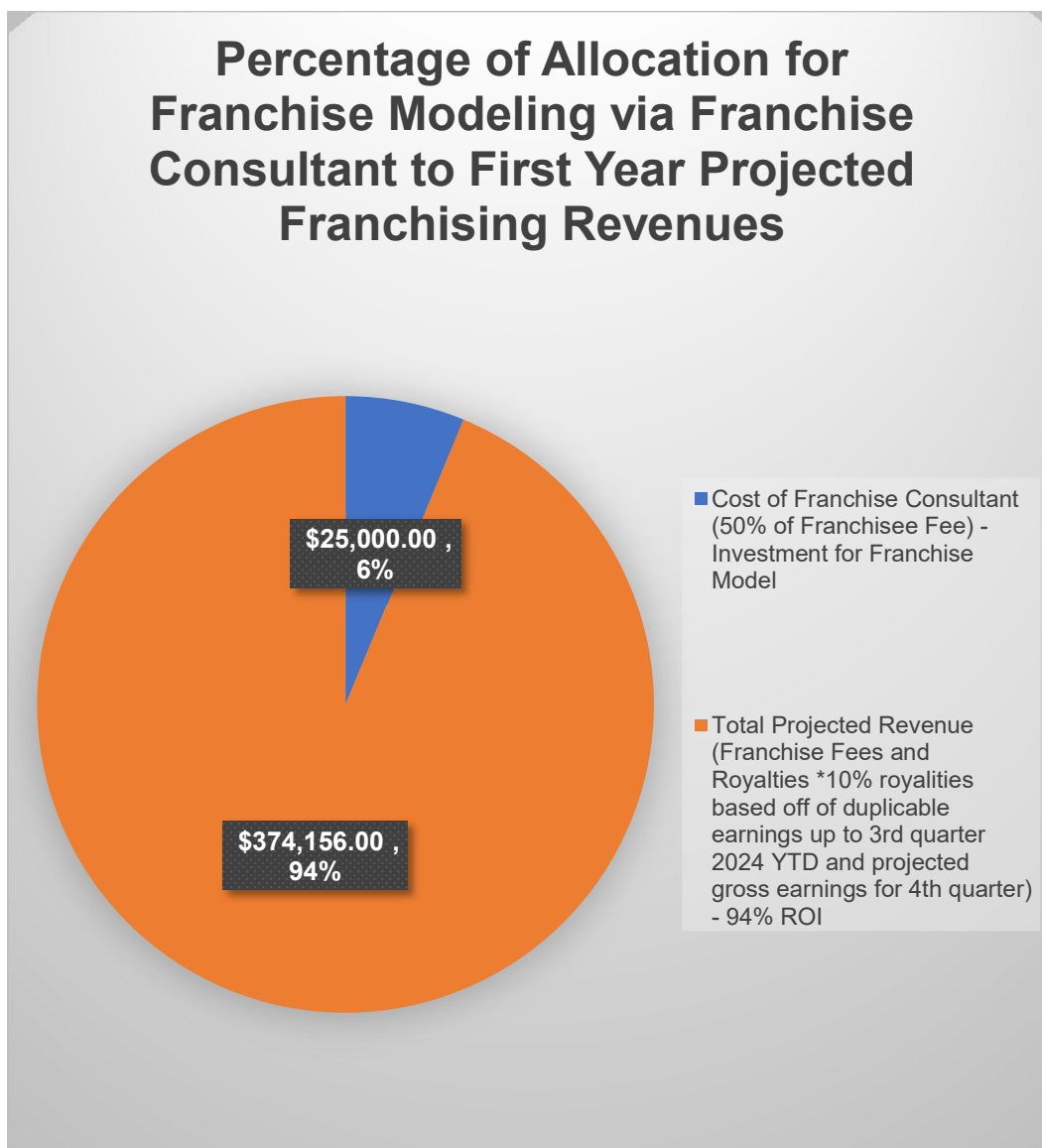
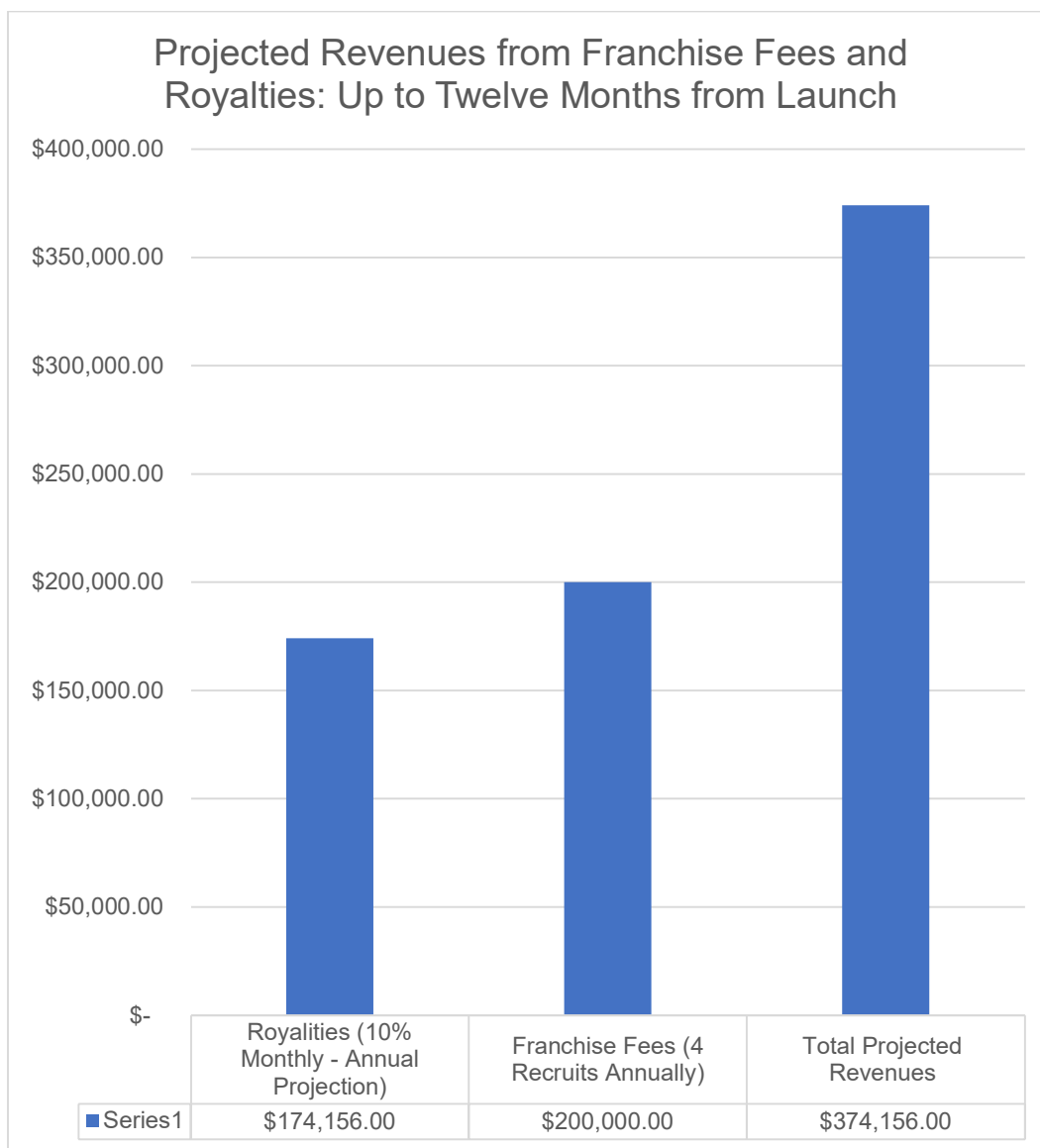


Figure 7 encompasses projected revenues from the initial investment into a franchise consultant for the creation of the franchise model, which is estimated to be approximately half of the franchise fee. If the franchise fee is projected to average \$50,000, with four recruits per year, and royalties are 10% monthly of the 3rd quarter 2024 YTD revenues with 4th quarter projections, then projections would entail a 6% investment to acquire a franchise business model for a 94% ROI within the first 12 months from launch.

Figure 7

Projected Revenues from Franchise Fees and Royalties for Up to 12 Months from Launch

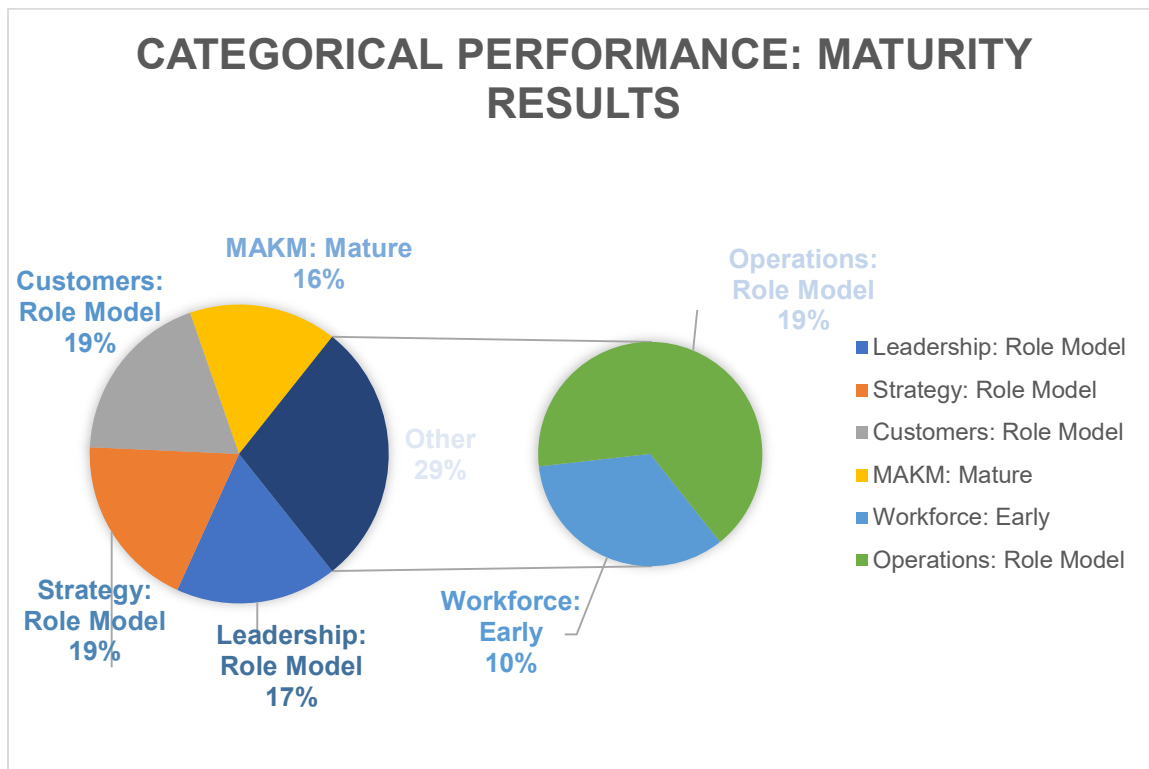


Process Evaluation

The Baldrige excellence assessment is used to evaluate *processes* and are based on four primary factors: 1) approach, 2) deployment, 3) learning, and 4) integration,

(ADLI) to reflect on strengths and opportunities for improvement in a holistic assessment of overall performance (Baldrige performance excellence program, 2023). The process items evaluate the most important processes for organizational performance improvement and Results items are the most important requirements for organizational success. Figure 8 depicts the holistic interpretation and assessment of the client-organization's maturity stages relative to its categorical performance of processes across the four primary factors indicated above.

A systematic approach assessment categorizes an organization into four stages based on process guidelines. The first stage is "reactive", where an organization lacks processes and goals. The second stage is "early" systematic approaches, where operations are coordinated with defined goals. The third stage is aligned approaches or "mature", where repeatable processes, strategies, and goals are shared and evaluated regularly. The final stage is integrated approaches or "role model", where efficiencies are achieved through repeatable processes, collaboration, innovation, information sharing, and progress tracking for strategic and operational goals.

Figure 8*Maturity Results**Process Strengths*

The methods the client-organizations uses based on ADLI are appropriate, effective, and repeatable processes. Refinement to the approach, as with Baldrige implementation, continues throughout the client-organizations evaluation for improvement. Its adoption of best practices to innovate and integrate its methods in a holistic and harmonized manner support organization-wide objectives and action plans. As indicated in Figure 8 above, the client-organizations' top performing categories consist of Operations, Strategy, and Customers, with emphasis on Leadership and

Measurement, Analysis, and Knowledge Management to support the development of Workforce.

The client organization's services were designed with the director's expertise and best practices in mind, improving operational effectiveness and satisfying client demands. Planning strategically considers the state of the economy, customer demands, delivery themes, and market trends. Impact, profitability, and the transformation of the human experience are the organization's three main objectives. Innovation and knowledge management are enhanced by effective communication, tracking daily activities, and active listening that all contribute to Process Strengths.

Process Opportunities

Areas of process opportunities that were specifically identified as current gaps within the client organization include: a) absence of an official procedure for verification and assurance of organizational data and information, and b) absence of an assessment for workforce capabilities or capacity needs. Therefore, one area for process opportunity is with senior leadership's safety and emergency management to develop performance excellence strategies to ensure adaptability to uncertain events and capitalize on opportunities. A second area for process opportunities includes cloud backups and enhancements in data security. A third area for process opportunities include diversification of investments that are essential for protecting the organization from market fluctuations and supply and demand of services.

Early emergency preparedness starts with a reactive approach, while a mature role model approach combines organizational analysis and innovation to prevent loss through

protection. A fourth area of process opportunity consists of information management and technology to secure intangible assets, while financial diversification and business insurance provide protection against unknown or uncertain events. Lastly, the fifth area for process opportunity consists of an integrated approach to franchise development involving in-depth business modeling with a franchise consultant that will enhance data quality into a purchasable program. Franchise creation, therefore, solves for an entrepreneurial and independent workforce of franchisees to locate business internationally. All process opportunities are areas in which the client-organization will readily put into action planning.

Results Strengths

The client-organization's results strengths encompass the outputs and outcomes that the organization achieved based on LeTCI. High-performance levels are fully responsive and trends have been sustained over time in all important areas in regard to the organization's mission to transform the human experience. Industry and benchmark leadership is fully demonstrated in multiple areas and performance results and projects were reported for organizational requirements. Since collaborating with the client-organization, I've identified various metrics over the last twelve months that are indicative of an increasing trend. The client-organization's Gross Revenues increased by 38%; Total Number of Clients increased by 46%; Total Top Performing Services Provided increased by 20%; Total Action Plans Initiated increased by 33%; and Total Strategic Goals on the Action Plan increased by 67% for a combined 204% increase in performance improvement.

Results Opportunities

Opportunities for results that encompass the most important requirements needed for organization success include reporting data that fully demonstrates levels, trends, and comparisons to showcase the integration of performance levels that are segmented to market or location, service or product. This could be an innovative approach to creating another action plan that is just as essential as a fuel gauge measuring the amount of gasoline in the vehicle to measuring the “energy” of the organization. The holistic action plan ensures that all aspects of the organization operate with high levels of efficiency without maxing out the “energy” of the senior leaders. The top-down approach to management of franchise creation creates a hierarchical structure in which the franchisor is also the parent company that grants the franchisee a license and trademark to operate its business. These results opportunities are exclusive of quantitative data and encompass Leadership and Governance.

Business Recommendations for Professional Practice

The business recommendations for professional practice pertains to applicability of findings with respect to the professional consulting practice. The contributions and recommendations are relevant to improving business practice and demonstrate strategic analysis of the client-organization to consider at under its own discretion. The recommendations do not constitute legal advice or counsel.

Leadership and Governance Recommendations

The business recommendations emphasize the importance of developing and implementing formal policies and procedures for performance evaluations for senior

leaders and ethical behavior across the client-organization to model for its franchisees. In addition, researching industry trends and implementing a more formal system for predicting future legal, regulatory, and community concerns should be considered for inclusion into the operations manual. When seeking to expand internationally, the cost-benefit analysis of franchisor-franchisee engagement should be considered as a sustainable long-term partnership is created. A well-established connection between engagement and performance outcomes is crucial, as it improves performance ratings, profitability, productivity, turnover, safety, shrinkage, absenteeism, quality, customer loyalty, and marketplace success (Kendall & Bodison, 2017). Therefore, Kendall and Bodison recommended recruiting *champions* that exhibit energy, motivation, loyalty, and identify with the organization's objectives and work collaboratively.

Vision and Mission

Culture is the driving force behind strategy and a palpable culture starts with a vision statement, which empowers and motivates employees/franchisees to contribute to the organization's objectives. A strong mission statement should be developed, emphasized, and tied to all communication and strategies. Alignment between the vision and strategy creates clear purpose and direction. Leadership, as defined by Northouse (2022), involves an individual or entity influencing a group of individuals to achieve a common goal or action plan. Overall, a strong culture and strong mission statement contribute to a successful organization.

Action Planning

I recommend organization leaders create and implement a strategic internal action plan with key performance metrics and indicators to monitor the efficiency of business operations. Smart leaders also incorporate data analysis to develop new procedures and accomplish strategic goals. Management and maintenance of resources require a balance to gain a competitive edge, expand business operations, and diversify operations. In accordance with an organization's values and objectives, I recommend aiming for quick action planning execution by including both short- and long-term projections to assess and incorporate sufficient effectiveness, quality, and performance.

Franchising

A comprehensive performance management system is necessary to define and fill gaps in valuable data collected for the Baldrige excellence framework assessment. This performance management system is one of the components needed to establish a business consulting franchise through thought-leadership. Complete transparency and disclosure of all components were required to avoid the perception of any gaps in the organization caused by missing information. In order to establish and maintain organizational knowledge, validate and guarantee the quality of organizational data, and pinpoint optimal methods for franchise establishment and growth, information and knowledge management is put into practice. Therefore, in exchange for a franchisee fee and regular royalties based on gross revenues, the franchisor grants the franchisee the right to use its brand name and provides a comprehensive program for starting and managing the business.

Strategic Context Recommendation

In response to the key strategic threats within the economy, Cassely et al. (2021) indicated, CSP is a powerful catalyst for businesses to innovate their business models and CSR practices offset the harmful effects of economic crises to implement more sustainable strategies in sync with values of stakeholders. Further, Cassely et al. stated economic crises reduce economic performance by increasing costs. Yet, some organizations leaders have leveraged threats as an opportunity to improve CSR practices and create greater shareholder value. Therefore, depending on the strategic context, I recommend innovating existing business models to readily adapt to economic fluctuations to manage and sustain the risks of economic threats to business operations.

In addition, Missimer and Mesquita (2022) noted that enterprise frameworks and commercial operations are intricately linked and business sustainability is only achievable through the ecological and social systems on which they depend. Further, Missimer and Mesquita found that ecological and social sustainability must be fully integrated at all levels of the organizational structure, and processes must align with organizational objectives. This research contributes to a performance strategy in identifying strategic solutions for improving sustainable practice during economic crises.

Further, Karnowati and Handayani (2022) stated that entrepreneurship and market orientation are correlated to competitive advantage, and business performance is a mediating factor for entrepreneurial orientation and competitive advantage. In addition, Zhou et al. (2009) determined that competitor-oriented firms can identify SWOT by using rivals as a frame of reference to internalize strengths through imitation or nullify

competitors' strengths through innovation. With that said, aside from implementing Baldrige as a strategic performance-based system, the organization then yields a competitive advantage strategy under the strategic context after the market analysis is conducted for competition. The organization's ability to be innovative, such as with technology and artificial intelligence integration to measure performance indicators, is a method of internal diversification to enhance sustainable growth initiatives.

Implications for Social Change

This research aims to fill in gaps in scholarly literature and contribute to positive social change by improving informed decision-making. Entrepreneurs in various industries, involving small-to-medium enterprises (SMEs), may benefit substantially from Effective International Corporate Diversification and Performance Improvement Strategies. The findings may be used to emphasize the value of strategic international diversification, corporate competence sharing with internal stakeholders, and the benefits to external stakeholders. Other ways these results demonstrate and promote corporate social responsibility include giving philanthropically and supporting, funding, sponsoring, or underwriting community projects. My doctoral research endeavor is noteworthy due to its capacity to exert a substantial impact on societal transformation.

Conclusion

A strategic tool for planning and evaluating organizational operations is the BEF. The BEF concentrates on workforce, operations, results, measurement, analysis, leadership, strategy, customers, and knowledge management. At full capacity, the consulting firm employs two directors as its current workforce profile. A few of the

difficulties the company faces are a shortage of talent pipeline, budgetary restrictions, and time constraints. Systemized approaches and diversification are necessary conditions to prioritize engagement, communication, ethical behavior, vision, and values. Through charitable giving and volunteer work, the organization places a high priority on community support and societal well-being. Organizational management, planning for capacity requirements, and an assessment of the workforce environment are opportunities for further development as well as a career development path and performance management system through the advocacy of a culture of open communication, high performance, and increased client satisfaction.

With a methodical approach to strategic and operational goals, the company's senior leadership and governance contribute to top-performing product/service and process results. This strategy is responsive, well-integrated, and implemented without any notable flaws or gaps in specific areas or work units. Best practices are evaluated and improved based on facts, and innovation is a crucial instrument for increasing efficacy and efficiency. With integrated approaches to strategic and operational goals, the client organization exhibits top-performing financial and marketplace performance. Innovative ideas, responsive deployment, and methodical, efficient methods are important organizational features. Organizational resilience and agility, which reflect the client organization's capacity to anticipate disruptions and implement flexible solutions, are what drive financial performance. "Strategic Sustainable Development" and "Energy Solutions," which give senior leaders performance improvement techniques, are the main themes.

Action plans are crucial for client-organization strategies and are not an internal function of the organization. They outline specific actions to achieve strategic objectives, such as using Baldrige criteria for performance excellence or exploring international diversification strategies. Key themes include financial limitations and the need for franchise agreements. To create a remote franchise or growth platform, strategies include selecting the right market, replicating the business model, integrating marketing, receiving financial support, and using franchise consultants to connect clients with franchisees.

The Baldrige excellence assessment evaluates processes based on four factors: ADLI. It focuses on strengths and opportunities for improvement in overall performance. Process strengths include appropriate, effective methods, while opportunities include safety and emergency management, financial diversification, and protection systems. Results strengths include high-performance levels, industry leadership, and performance results. Opportunities include reporting data to showcase integration of performance levels, and segmenting performance to market, location, service, or product. A holistic action plan ensures organizational success.

The professional practice recommendations for professional consulting include developing formal policies for senior leaders, researching industry trends, and considering cost-benefit analysis of engagement. A strong mission statement, aligned with the organization's objectives, is crucial for motivation and engagement. A strategic internal action plan with key performance measures and indicators is essential for business diversification, growth, and competitive advantage. The leadership system

components should be defined and implemented, and information and knowledge management should also be implemented. The franchise model should be developed, and the client-organization's approach should be refined throughout evaluation for improvement and adoption of best practices.

CSP can help businesses innovate their business models and CSR practices to adapt to economic crises and create sustainable strategies. Ecological and social sustainability must be integrated at all organizational levels, aligning with objectives. Market research shows that competitive environment influences business performance, and entrepreneurship and market orientation are correlated. Innovation and internal diversification are key strategies for success.

I aimed to focus on the implications for the practice of business to encourage strategic decision-making through corporate competency to result in advantageous social change and positively impact business professionals in a variety of industries, including franchise and small-to-medium enterprises, by influencing their strategic path. The findings draw attention to the necessity of corporate knowledge sharing with internal stakeholders, strategic international diversification, and the helpful assistance of external stakeholders like families and communities. The research project's significance stems from its ability to contribute to the body of existing literature on business administration and to positively influence cultural transformation.

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Appendix A: Service Order Agreement

Project Proposal

It is the intent of the above-named Parties to work together to provide the student with an opportunity to complete a Walden University Doctor of Business Administration capstone project (the *Project*). This Project Proposal sets forth the responsibilities of the Parties and the scope of the Project.

Scope of Project

The table below reflects mutual expectations, outcomes, and deliverables for the project.

Work Phase	Estimated Time Required
<p>Online interactions: Private audio-recorded Zoom meetings will be held once a week occurring on Sunday EST/Monday NZT for a duration of 30 to 60 minutes, or as required.</p> <p>Note: Per ethical requirements, any video feed produced from video-recorded meetings will be deleted immediately following the interview.</p>	<p>30 – 60 min/week * 40 wks. = 1,200 – 2,400 minutes or approximately 20 – 40 hours total</p>
<p>Scope:</p>	<p>In general, each semester credit equals about 42 hours of</p>

<ol style="list-style-type: none"> 1. “Student” will serve as a business consultant to the leader of the “Organization”. 2. “Student” will provide in-depth research conduction and coaching to “Organization” to improve key-processes, overcome strategic challenges, and increase performance. 3. “Student” will collaborate with “Organization” to promote positive social change. 4. “Student” will provide evidence-based observations and recommendations to “Organization” to strengthen managerial frameworks and for results-driven improvement. 5. “Organization” will provide “Student” with access to internal documents, operational records, or archival data such as: de-identified personnel records; meeting minutes; digital/audio/video recordings created by partner organization; training materials; performance indicators, sales reports, business plans; protocols, manuals, reports agreements; surveys collected by leader; internal web postings; other internal documents. 	<p>total student work” at minimum; 16 weeks in a semester is roughly 6 hours minimum per week up to 25 hours a week as time required varies weekly per courseload.</p> <p>Therefore, estimated project time to completion required falls at minimum of $(6*40) = 240$ hours to $(25*40) = 1,000$ hours maximum.</p>
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6. "Student" will source public data, leader interviews, and archival data as indicated above.
 7. "Organization" will provide "Student" with contact information for potential participants.
 8. "Organization" will permit "Student" to use employees paid time for data collection.
 9. "Organization" will permit "Student" to evaluate/study its operations/services.
 10. "Student" will evaluate effectiveness and outcomes of "Organization" with systems-based Baldrige Framework; will development and implement strategic interventions and actionable feedback to ensure "Organization's" success, now and in the future.
 11. "Student" will develop and provide Service Order Agreements, Interview Consent Forms, and other deliverables as required to the "Organization."
 12. "Student" will utilize the Service Order Agreement and corresponding Term-Plan to achieve various milestones and for Doctoral Project Management.
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13. “Student” will stay within the preapproved parameters of the Consulting Capstone Manual as required, consistent with the International Review Board (IRB).
 14. “Student” will comply with all ethical obligations and requirements ensuring privacy, confidentiality, and anonymity.
 15. “Student” will password protect any research data on devices or drives for 5 years for security, after which, all forms of data will be permanently destroyed and will be restricted from upload to the cloud.
 16. “Student” will maintain a quality relationship with the “Organization” and demonstrate integrity, scholarship, and focus on effective positive social change to promote successful outcomes.
 17. “Student” will comply with any international ethical regulations including the “Organization’s” policies, practices, procedures or protocols.

Outcomes:

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1. Written case study proposal for approval, review, and publication via Walden University doctoral reviewers.
 2. Formal oral defense of proposal for final University review; employ review processes and presentations for proposal.
 3. Strong relationship and collaboration between doctoral chair and committee with focus on honesty, openness, and collegiality.
 4. Strategy for developing best practices to complete doctoral study; data analysis of key processes and results of “Organization”.
 5. Experience and resumé building for post-doctoral employment; assessment of contribution of research to society.

Deliverables:

1. Qualitative Single Case Study including executive summary of key themes, actionable feedback on strengths and opportunities for improvement, and a list of vital priority objectives.
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2. “Organization”-approved version of case study will be submitted to Walden University for publication.	
Additional Services Provided if Requested.	
Total	260 – 1,040 hours

Services Summary	Length of
<p><i>Timeframe and Objectives:</i></p> <p><u><i>Part One - 2nd half of Fall Semester: 10/30/2023</i></u> – <u><i>12/24/2023</i></u>: Establish Service Order Agreement, Begin and Complete Organizational Profile by term end, Obtain IRB approval, begin data/information collection required for Organizational Profile</p> <p><u><i>Part Two and Three– Spring Semester:</i></u> <u><i>01/08/2024 – 04/28/2024:</i></u></p> <p>Implement Baldrige Framework; Complete Prospectus Stage and Begin Proposal Stage</p>	<p>Engagement</p> <p>From date: 10/30/2023 To date: 08/25/2024</p> <p>Or extended until doctoral capstone is fully completed.</p>

<p><u>Part Four – Summer Semester: 05/06/2024 – 08/25/2024:</u></p> <p>Finalize Implementation of Baldrige Framework; Complete Proposal Stage; Begin Final Document Completion Stage beginning 2nd half of summer semester 07/01 for presentation, delivery, and publication.</p>	
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Terms of Agreement and Party Responsibilities:

I. Confidentiality

- a. In all reports (including drafts shared with peers and faculty members), the student is required to maintain the Organization's confidentiality by removing names and key pieces of information that might disclose the identity of individuals or the Organization, or inappropriately divulge proprietary details concerning the Organization.
- b. If the Organization wishes to publicize the findings of this project, it may do so at its discretion.
- c. The student will not use data obtained from the Organization for any purpose other than the Project outlined in this Agreement.

- d. The Organization may require the student to sign a Non-Disclosure Agreement if desired by the Organization.

II. Publication

- a. The student will publish the Project case study in ProQuest as a doctoral capstone. The Organization's identity and participant identifiers will be withheld. The Organization will have no right to any intellectual property developed as a result of this Agreement because of the Organization's voluntary role in this Project.
- b. Any publications or presentations beyond the doctoral program's required capstone must be negotiated separately between the Organization and the Student.

III. Scope of Project Data

- a. The Project case study will be based upon audio-recorded interviews with non-vulnerable adults on the topic of the Organization's business operations, review of public records, and review of internal records/documents related to the Organization's operations that the Organization deems appropriate for sharing with the student.
- b. Upon request, audio recordings of the interviews as well as full transcripts will be shared with any interviewee, at which time the student will provide an

opportunity for the interviewee to clarify statements made during the interview.

- c. Transcripts with participant and Organization identifiers withheld, may be shared with the student's university faculty, peer advisors, and site leadership.
- d. Video recordings of the interviews are not permitted.

IV. Organization Responsibilities

- a. The Organization reserves the right to withdraw from the Project at any time.
- b. The Organization agrees to provide training to the student concerning any Organization-specific regulatory or legal requirements, including Organization confidentiality processes and procedures, that the student will need to comply with during the Project.
- c. The Organization's signatory below has the authority to bind the Organization to the terms of this Agreement.

V. Student Responsibilities

- a. The student has the right to withdraw from this Agreement at any time.
- b. The student will obtain interviewees' consent to conduct the interview and record the interview. As the interview is voluntary, the student agrees to stop conducting the interview upon the interviewee's request.
- c. The student is responsible for understanding and complying with all of the Organization's policies and regulatory requirements.

- d. The Student agrees to abide by the [Ethical Standards for Doctoral Student Consulting Relationship](#).

VI. Miscellaneous

- a. The Organization and the Student agree to comply with all applicable laws and regulations, including laws prohibiting discrimination.
- b. The Organization and the Student will evaluate the Project at mutually agreeable times, planning for its continuous improvement, making such changes as are deemed advisable and discussing problems as they arise concerning this Project.
- c. The Parties agree that they are independent contractors, and that the student is not and will not be considered an employee of the Organization or any of its subsidiaries or affiliates by virtue of the student's engagement in this Project and shall not as a result, be entitled to compensation, remuneration or benefits of any kind.
- d. This Agreement is nonexclusive. The Organization reserves the right to enter into similar agreements with other consultants/students and universities.

Appendix B: Ethical Standards for Doctoral Student Consulting Relationship

The Code of Conduct in the Walden University Student Handbook and the ethical requirements for the university's Institutional Review Board compliance bind DBA students in the consulting capstone. Also, DBA students are required to uphold professional principles in fulfilling their roles as consultants and coaches to client organizations. Beyond the confidentiality requirements outlined above, three principles are key to ensuring ethical conduct in consulting relationships.

Principle 1: Protect the integrity of Walden University

- Not representing conflicting, competing interests, or positioning themselves such that their interest may be in conflict or may be perceived to be in conflict with the purposes and values of Walden University
- Not intentionally communicating false or misleading information that may compromise the integrity of Walden University and of the consulting capstone experience.

Principle 2: Exhibit professional conduct at all times.

- Respecting the climate, culture, values, and regulatory requirements of client organizations and client workforce members

Principle 3: Protect the promise of confidentiality.

- Not using or adapting client organization's data and information after the capstone experience unless the information has been publicly shared by the client.
- Not conducting telephone conferences with the client organization in public places where information may be overheard.

Appendix C: Executive Summary for Client Organization Leadership

Baldrige Excellence Builder: A Strategic Tool for Organizational Operations

The Baldrige Excellence Builder is a strategic tool for planning and evaluating organizational operations. The tool focuses on workforce, operations, results, measurement, analysis, leadership, strategy, customers, and knowledge management. Challenges faced by the company include a talent shortage, budgetary restrictions, and time constraints.

Systemized approaches and diversification are necessary to prioritize engagement, communication, ethical behavior, vision, and values. The organization prioritizes community support and societal well-being through charitable giving and volunteer work. Opportunities for further development include organizational management, capacity requirements planning, and workforce environment assessment. The company's senior leadership and governance contribute to top-performing product/service and process results.

The Baldrige excellence assessment evaluates processes based on approach, deployment, learning, and integration (ADLI). Professional practice recommendations include developing formal policies for senior leaders, researching industry trends, and considering cost-benefit analysis of engagement. Corporate social performance (CSP) can help businesses innovate their business models and CSR practices to adapt to economic crises and create sustainable strategies. Innovation and internal diversification are vital strategies for success.

BEF Results Review Overview

- Reviews services and processes, including operational performance, customer-focused performance, workforce learning, leadership and governance, and financial, marketplace, and strategy sustainability.
- BEF emphasizes the superior value of offerings and superior organizational performance.
- Each result category includes identification of relevant finding themes, description of how findings confirm, disconfirm, or extend knowledge, and correlation to the conceptual framework.
- Qualitative benchmarking is used across categories to identify and measure results.
- Four results factors: levels, trends, comparisons, and integration (LeTCI) of organizational outputs that are used for holistic assessment and evaluation.

Product and Process Results

- Senior Leadership and Governance and Societal Contributions: Top performing with fully integrated approaches towards strategic and operational goals.
- Strategy: Development and Implementation: Top performing with fully integrated approaches towards strategic and operational goals.
- Process Effectiveness and Efficiency: Top performing with fully integrated approaches towards strategic and operational goals.
- Customer Results: Top performing with fully integrated approaches towards strategic and operational goals.

Workforce and Leadership Performance

- Early systematic approaches are aligned with strategic operational goals.
- Evaluation and improvement of crucial processes evident.
- Sharing of refinements, best practices, and innovation to improve efficiency and effectiveness.
- Approach for establishing a franchise or growth platform in the early alignment stages to organizational objectives in progress.

Leadership and Governance Results – Measurement, Analysis, and Knowledge Management

- Top-performing results for measurement, analysis, and knowledge management of organizational performance and knowledge.
- Effective, systematic approach with responsive deployment without significant weaknesses or gaps.
- Fact-based, systematic evaluations and refinements adopted for best practices.
- Innovation is a vital tool for improving efficiency and effectiveness.

Financial and Market Results

- Top performing financial and market results with fully integrated approaches towards strategic and operational goals.
- Organizational resilience and agility were determined.

- Measurement, analysis, review, and improvement of organizational performance consists of performance in a financial management approach.

Marketplace Performance

- Firm 4 provides services similar to those provided by client organizations in human resource acquisition and leadership mentoring.
- Common themes across all consulting firms are "Strategic Sustainable Development" and "Energy Solutions."

Key Themes Findings in Business Growth

- Clients express a desire to expand their workforce to service additional clients.
- Franchising and contracting the primary owner's business can diversify the workforce, limit employee risk, and allow senior leaders to expand operations.
- The cost of drafting and developing a franchise agreement is minimized to professional fees.
- Strategies for creating a remote franchise or growth platform are discussed, primarily targeting small business owners.
- Key questions include which market franchisees will enter, how the franchise system will be integrated into the business plan, what financial support the franchise system launch will receive, and if the client organization is open to hiring a franchise consultant.

Baldrige Excellence Assessment and Process Evaluation

- Baldrige excellence assessment evaluates processes based on approach, deployment, learning, and integration (ADLI).
- The assessment reflects on strengths and opportunities for improvement in overall performance.

Process Strengths

- The methods used by client organizations are effective and repeatable.
- Refinement of the approach continues throughout the evaluation for improvement.
- Adopting best practices is ongoing to innovate and holistically integrate methods.

Process Opportunities

- Emphasis is placed on safety and emergency management and preparedness of senior leadership.
- The cloud is used as a backup for data and syncing.
- Hedging risk or diversifying investments is an effective strategy to mitigate and stabilize business problems.
- Information management and IT secure an organization's intangible assets.
- Financial diversification through multiple investments disperses risk.
- Protection of unknown or uncertain events is readily available through business insurance.
- Key leader insurance protects senior leaders against losses in the event of a disability, critical illness, or death.

Results Strengths

- The strengths of the client organization's results encompass outputs and outcomes based on levels, trends, comparisons, and integration (LeTCI).
- High-performance levels are fully responsive, and trends have been sustained.
- Industry and benchmark leadership is fully demonstrated in multiple areas.

Results Opportunities

- Report data that fully demonstrates levels, trends, and comparisons to showcase the integration of performance levels.

Professional Practice Recommendations for Professional Consulting

- Develop formal policies and procedures for performance evaluations and ethical behavior.
- Research industry trends and implement a system for predicting future legal, regulatory, and community concerns.
- Consider the cost-benefit analysis of engagement when expanding.
- Measure workforce commitment to the organization's mission, vision, and values.
- Consider culture as the engine-driving strategy.
- Develop a strong mission statement tied to all organization communications and strategies.
- Create a strategic internal action plan with key performance measures and indicators.
- Define leadership system components and ensure full disclosure of criteria.

- Implement information and knowledge management to verify and ensure organizational data quality.
- Develop a franchise model with a franchisee fee and regular royalty based on sales volume.

Strategic Context Recommendation for Businesses

- Corporate Social Performance (CSP) catalyzes businesses to innovate their business models and CSR practices.
- Economic crises can reduce economic performance by increasing costs but can also be leveraged to improve CSR practices and create shareholder value.
- Innovation of existing business models is recommended to adapt to economic fluctuations to manage the risk of economic threats.
- Ecological and social sustainability must be integrated at all levels and aligned with objectives.
- Market research indicates that market competition correlates with business performance.
- Entrepreneurship and market orientation correlate to competitive advantage, with business performance as a mediating factor.
- Competitor-oriented firms can identify SWOT by using rivals as a reference.
- Implementing Baldrige as a strategic/performance-based system and implementing innovative technology and artificial intelligence integration, is a method of internal diversification.