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Effective Strategies for Business Leaders of Homeschool Consulting and Testing Services to Attract New Clients and Sustain Operations

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Walden University

College of Management and Human Potential

This is to certify that the doctoral study by

Chartel A. Amos

has been found to be complete and satisfactory in all respects,
and that any and all revisions required by
the review committee have been made.

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Walden University
2025

Abstract

Effective Strategies for Business Leaders of Homeschool Consulting and Testing
Services to Attract New Clients and Sustain Operations

by

Chartel A. Amos

MBA, Capella University, 2020

BS, Capella University, 2020

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

Walden University

November 2025

Abstract

Business leaders of homeschool consulting and testing services are experiencing a critical challenge in attracting new clients, which threatens their ability to sustain operations. Grounded in the Baldrige excellence framework and the diffusion of innovation theory, the purpose of this qualitative single case study was to explore effective strategies used by one business leader of a homeschool consulting and testing services organization in North Carolina to attract clients and sustain operations. Data sources included (a) semistructured interviews, (b) organizational archival records and documents, (c) public data such as reports and websites, and (d) literature including peer-reviewed articles and books. Findings from thematic analysis revealed themes of process strengths, process opportunities, results strengths, and results opportunities. A key recommendation was for educational consulting leaders to adopt targeted digital marketing integrated with performance excellence frameworks to enhance client acquisition and operational sustainability. Implications for positive social change include the potential for expanding access to tailored educational services, strengthening parental capacity, and promoting educational equity and long-term student success in underserved communities.

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Dedication

I dedicate this dissertation to my family, both given and chosen, whose love and support have shaped the person I am today. To my mother, whose journey taught me the power of resilience and renewal, your strength continues to inspire me. Though I never knew my birth father, I carry with me the understanding that life's path is not defined by absence but by the love and guidance we receive along the way. I am grateful for being adopted at the age of four and for the opportunities that love made possible. I also dedicate this work to my two beloved furry companions, Hank and Carr, whose presence has brought me comfort, joy, and unwavering companionship throughout this process. Finally, I dedicate this study to all who believe in second chances and in building lives of purpose through perseverance and hope.

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Finally, I wish to thank my family, friends, and loved ones who stood by me with love, understanding, and unwavering belief in my purpose. This accomplishment belongs not only to me but to all of you who helped light the way.

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Section 1: Project Foundation

Background of the Problem

Business leaders of homeschool consulting and testing services experienced a critical challenge in attracting new clients due to limited marketing reach and a lack of brand visibility in the broader homeschooling community. These issues hindered the organization's growth as potential clients were unaware of the unique value the organization offered in supporting homeschool parents. Researchers indicated that small businesses in niche markets often struggle with client acquisition without a strong marketing strategy (Baker & Hart, 2016), and a limited online presence can further constrain outreach efforts (Murphy, 2021). When an organizational leader does not effectively address such challenges by expanding their marketing efforts, their ability to grow and serve more families is significantly constrained.

Business Problem Focus and Project Purpose

The specific business problem was that some business leaders of homeschool consulting and testing services lack effective strategies to attract new clients, which limits the organization's ability to grow and sustain its homeschool consulting and testing services. Therefore, the purpose of this qualitative single case study was to identify and explore the effective strategies GS (a pseudonym for Growing Scholars Educational Testing & Consultation) employed to attract new clients and to sustain the organization's homeschool consulting and testing services. For purposes of confidentiality and consistency in this study, the pseudonym GS was used throughout to refer to the organization.

The specific population group for this project included the business leader of a single homeschool consulting and testing services organization who was responsible for developing and implementing client acquisition strategies for the organization's homeschool consulting and testing services. This participant was directly involved in addressing the challenges of attracting new clients and ensuring the sustainability of GS's operations. The sampling method for this study was purposive sampling, focusing on the sole business owner of GS, who was directly responsible for client acquisition and strategic decision-making. Because there was only one part-time business leader with no additional staff or volunteers, insights were gathered solely from this individual to address the organization's client acquisition challenges. The key participant eligibility criterion for this project was that the individual must be the business leader of GS because this person is solely responsible for the organization's client acquisition strategies and overall operations. Access to the participant was straightforward because the owner was the only individual managing the organization, ensuring direct communication and availability for data collection through interviews and relevant documentation review.

Qualitative methodology was appropriate for this study because it allowed for an in-depth exploration of the unique strategies employed by the business leader in attracting new clients. Given the subjective nature of the challenges in client acquisition and the need to understand the personal experiences, perspectives, and decision-making processes of the leader, qualitative methods such as interviews and document analysis were appropriate (see Ravitch & Carl, 2021). This approach facilitated a comprehensive

understanding of the problem in its real-world context, which was essential for developing tailored strategies for growth and sustainability (see Saldaña & Omasta, 2021).

A single case study design was appropriate for this study because it facilitated an in-depth exploration of the challenges and strategies related to client acquisition within the organizational context: a single organization with a unique structure and operational dynamics. Because the business had one owner and no additional staff or volunteers, the case study design allowed for a focused and detailed examination of the problem. The case study design was ideal for capturing the complexity of the organization's circumstances and developing practical solutions tailored to its needs (see Saunders et al., 2018). Additionally, the case study approach enabled the integration of multiple data sources, such as interviews and document reviews, which supported a holistic understanding of the issues facing GS (see Ravitch & Carl, 2021).

All data were collected from the client organization leader by phone, email, or virtual meeting platforms. Only audio recording occurred. Study data included (a) semistructured interviews with the business leader; (b) existing organizational internal archival data such as records, documents, and artifacts release by the organization leader; (c) public data such as reports and websites; and (d) literature such as books, peer-reviewed articles, and other bodies of written knowledge that communicated substantive research findings about practices that were relevant to the topic. Thematic analysis was used for the data analysis process. Member checking, data saturation, and methodological triangulation were also used as part of the analysis process to ensure credible findings.

The framework for this study was a composite conceptual framework based on two theories: (a) the Baldrige excellence framework and (b) the diffusion of innovation (DOI) theory. Developed by the National Institute of Standards and Technology (NIST) in 1987, the Baldrige excellence framework offered a systems-based approach to performance excellence by focusing on key aspects such as leadership, strategic planning, customer focus, and process management. Applying the Baldrige excellence framework allowed for an analysis and improvement of GS's strategies for client acquisition and organizational growth by emphasizing these core components.

The DOI theory created by Rogers in 1962 explains how innovations and new ideas are adopted within a population over time. This theory guided the understanding of how GS could effectively spread awareness of its services within the homeschooling community, thereby increasing client acquisition by addressing the stages of adoption and the factors influencing parents' decisions to seek out GS's consulting services.

Together, these theories provided a holistic approach to understanding GS's client acquisition challenges, addressing both internal organizational performance (via the Baldrige excellence framework) and external client behavior and adoption patterns (via DOI theory). This combination allowed for a dual focus on operational efficiency and market influence, aligning internal improvements with effective outreach strategies in the homeschooling community.

Project Research Question

What effective strategies do business leaders of homeschool consulting and testing services use to effectively attract new clients and sustain operations?

Assumptions and Limitations

Assumptions

Assumptions in research are beliefs accepted as true without empirical validation but are necessary for the framework of a study (Wilson & Usher, 2022). These assumptions provide the foundation for the research, guiding its design and scope while ensuring that the study can progress despite uncertainties. However, because unverified assumptions lacked empirical verification, the influence of these assumption on the research was acknowledged.

One underlying assumption was the availability of individuals directly involved in developing and implementing client acquisition strategies within the homeschool consulting organization. Adequate participation is critical to obtaining comprehensive and meaningful data. It was assumed that participants would provide truthful responses during interviews because the reliability of qualitative research depended on the authenticity of participant feedback (see Wilson & Usher, 2022). Additionally, I assumed that participants would provide forthcoming relevant information, including successes, challenges, and operational practices. Participants' openness was essential to collecting in-depth data aligned with the research objectives.

Participants were assumed to have sufficient experience and knowledge to provide insights into the organization's client acquisition strategies, ensuring the data collected effectively addressed the specific business problem. Furthermore, I assumed that the organization's operational and market conditions would remain consistent throughout the research period, allowing findings to reflect a stable context and

minimizing the impact of unexpected external factors (see Mikalef et al., 2020). Lastly, although the project focused on a single organization, I assumed the strategies and insights identified may be relevant to other entities operating within the homeschool consulting and testing services sector. This broader applicability enhanced the research project's potential contribution to the field.

Limitations

Research limitations are constraints or weaknesses inherent in the research design that may affect the research project's outcomes and conclusions (Dawson & Reid, 2021). These factors are typically beyond the researcher's control and must be disclosed to ensure transparency and contextual understanding of the findings. One limitation of the current research project was its focus on a single organization and a small number of participants, which may restrict the generalizability of its findings to other contexts or organizations (see Dawson & Reid, 2021). The availability and willingness of participants to engage fully in the research process may also have influenced the depth and quality of data collected because scheduling conflicts or professional commitments could have limited the scope of the interviews. Additionally, participants may have hesitated to share sensitive or potentially critical information about their strategies or challenges, resulting in incomplete data and potentially skewed conclusions (see D. Jones & Thompson, 2023).

In this project, I relied on self-reported data, which were susceptible to recall bias or selective reporting. Participants may have unintentionally omitted critical details or provided responses aligned with perceived expectations rather than actual practices (see

Mikalef et al., 2020). The subjectivity inherent in qualitative research introduces another limitation because the researcher's interpretation of interviews and organizational documents could introduce bias despite efforts to ensure rigor (Wilson & Usher, 2022). Resource constraints, including limitations in time and funding, can restrict the scope of data collection and analysis, further narrowing the research project's breadth (Dawson & Reid, 2021). External market factors, such as economic shifts, regulatory changes, or evolving market dynamics, may have influenced the organization's strategies during the research period. These unpredictable external factors were outside the study's control and may have influenced the applicability of the findings.

Business Project Ethics

As the researcher, I served as the primary instrument in the data collection and analysis processes, a role that is foundational in qualitative research. My responsibilities included using a semistructured interview protocol, conducting interviews, and collecting secondary data such as organizational documents to ensure a comprehensive understanding of the research problem. The primary interview questions are located in Appendix A, while the interview protocol can be found in Appendix B. The qualitative nature of this research project required me to engage directly with participants to elicit rich, detailed narratives about their experiences, strategies, and challenges. Additionally, my role extended to analyzing the data, identifying patterns and themes, and synthesizing findings to answer the research question: What effective strategies do business leaders of homeschool consulting and testing services use to effectively attract new clients and sustain operations?

Maintaining neutrality was critical in the role of researcher. It was necessary to remain impartial and to avoid introducing bias that could have affected the integrity of the data collection and analysis. Although the researcher possessed a professional understanding of the challenges facing small businesses, there was no direct connection to the organization or its participants, which allowed an objective stance to be maintained. As Creswell and Poth (2021) noted, the researcher in qualitative studies acts as a “human instrument” (p. 43), interpreting data through a systematic and ethical framework. This role required a combination of academic rigor, ethical responsibility, and adaptability to navigate the complexities of participant interactions and data collection.

Ethical Role and The Belmont Report Protocol

The ethical foundation of this research was guided by *The Belmont Report*, which outlined three core principles essential to research involving human participants: respect for persons, beneficence, and justice (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979). These principles shaped every aspect of the research project, from participant recruitment to data analysis and reporting. Respect for persons emphasizes the importance of autonomy and informed consent. Participants were provided with detailed information about the study’s purpose, procedures, potential risks, and benefits. This ensured they could make an informed decision about whether to participate. Beneficence required me to minimize potential risks to participants while maximizing the potential benefits of the research. This

principle was upheld by designing an ethically sound study that prioritized participant well-being. Justice ensures that the selection of participants is equitable and inclusive, avoiding exploitation or exclusion based on irrelevant criteria (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979). Ethical considerations also include transparency and accountability. As the researcher, I was committed to maintaining open communication with participants and adhering to the principles of *The Belmont Report* to ensure that all aspects of the study were ethically sound. This included addressing any concerns participants may have had and ensuring their rights were respected throughout the research process.

Institutional Review Board Expectations and Informed Consent Process

The Walden University Institutional Review Board (IRB) played a crucial role in safeguarding the ethical integrity of the research. Before data collection began, I was required to submit a comprehensive research proposal to the IRB, detailing the study's objectives, methodology, and ethical safeguards. The IRB ensured that the study would comply with ethical guidelines and federal regulations, providing oversight to protect participants' rights and welfare (Walden University, 2023). Approval from the IRB demonstrated that the research met the highest ethical standards, with the approval number for this study being 11-18-24-1223820. A Service Order Agreement was signed by the organization leadership (see Appendix C). The informed consent process is a cornerstone of the IRB protocol. The consent form ensured that the participant fully understood their role and were comfortable with their involvement. Informed consent not only protects participants but also enhances the credibility of the research by ensuring

that data are collected ethically and transparently (Townsend & Wallace, 2022).

Participants received a clear and detailed explanation of the informed consent process, including the study's purpose, procedures, voluntary nature, potential risks, and their right to withdraw at any time.

Procedures for Participant Withdrawal

Participants had the right to withdraw from the study at any point without facing penalties or consequences. This right was clearly stated in the informed consent form and reiterated during the recruitment and interview process. Participants were allowed to withdraw by notifying the researcher via email or verbally during the interview process. If a participant had withdrawn, that individual's data would have been excluded from the study unless explicit permission for its use has been granted. This process ensured that participants retained control over their involvement, which aligned with the principles of respect for persons and beneficence outlined in *The Belmont Report*.

Incentives

No monetary or material incentives were provided to participants in this study. By forgoing financial or material incentives, the project underscored its commitment to ethical research practices and authentic engagement (Largent et al., 2020). Instead, participants were informed that their involvement contributed to advancing academic knowledge regarding effective client acquisition strategies in homeschool consulting services (Kahveci, 2025). This decision ensured that participation remained voluntary and free from extrinsic rewards.

Protection of Participant Confidentiality

Confidentiality is a fundamental aspect of ethical research and is rigorously upheld throughout this study. Participant identities and organizational details are anonymized, with pseudonyms used in all transcripts, analyses, and reports. Maintaining confidentiality fosters trust between the researcher and participants and aligns with ethical guidelines for protecting sensitive information (Yin, 2021). Identifying information is stored separately from the data and is accessible only to the researcher. This ensures that participants' privacy is protected and their data is not misused.

Data Storage and Security

To comply with ethical research standards, all data collected during the study were securely stored for 5 years, as required by IRB regulations. Digital files, such as interview recordings and transcripts, were stored on a password-protected computer with encryption software. Physical documents, such as consent forms and printed transcripts, were kept in a locked cabinet accessible only to the researcher. After the 5-year retention period, all data were scheduled to be securely destroyed to protect participant confidentiality. These measures aligned with ethical best practices for data security and integrity (Saldaña & Omasta, 2021).

Evidence-Based Integrative Review

Application to the Applied Business Problem

The purpose of this project was to explore effective strategies that homeschool consulting and testing services business leaders used to attract new clients and to sustain operations. By addressing the applied business problem of overcoming challenges related

to client acquisition, brand visibility, and market positioning in niche industries, this qualitative single-case study generated actionable insights by examining the effective strategies employed by business leaders at GS to attract new clients and to sustain their homeschool consulting and testing services. The emphasis of this evidence-based integrative review was a critical analysis and synthesis of relevant literature, which established the foundation for the project's conceptual framework and its alignment with previous research. This analysis also compared varying perspectives, methodologies, and findings to highlight knowledge gaps and practical applications. The literature review for this project provided a critical analysis and synthesis of a variety of sources, including peer-reviewed journal articles, government reports, and seminal scholarly books, to explore strategies for client acquisition and sustainable operations within niche markets, particularly homeschool consulting services. The sources were selected to offer both theoretical depth and practical insight, demonstrating a comprehensive scope of inquiry.

Databases Used and Keywords

To ensure the comprehensiveness and quality of the literature review, multiple academic databases were used to gather relevant sources. These databases were recognized for providing high-quality, peer-reviewed articles, books, and reports in the fields of business, marketing, and education: (a) Google Scholar, (b) JSTOR, (c) PubMed, (d) Business Source Complete (EBSCOhost), and (e) ERIC (Education Resources Information Center). Keywords used for the literature search included client acquisition strategies, homeschool consulting services, niche market education, Baldrige Excellence Framework, diffusion of innovation (DOI) theory, digital marketing in

education, operational efficiency in SMEs, small business marketing, educational consulting, and client retention. These databases and keywords allowed for a thorough search of relevant literature, ensuring that the review included a wide breadth of scholarly perspectives and practical insights into improving client acquisition and operational sustainability in the niche market of homeschool consulting services.

Conceptual Framework

This project was built on a composite conceptual framework that integrated the Baldrige Excellence Framework and the Diffusion of Innovation (DOI) theory, offering a holistic approach to solving the applied business problem of improving client acquisition strategies and ensuring sustainable operations in homeschool consulting services. The Baldrige Excellence Framework, introduced by the National Institute of Standards and Technology (NIST) in 1987, emphasized a systems-based approach to organizational performance that focused on leadership, strategy, customer focus, measurement and analysis, workforce, and operations (NIST, 2023). It had been widely applied in small and medium enterprises, where it improved customer satisfaction, operational efficiency, and innovation (Bou-Llusar et al., 2009). The DOI theory, conceptualized by Rogers in 1962, examined how innovations and new ideas were adopted within a population. DOI highlighted five attributes—relative advantage, compatibility, complexity, trialability, and observability—that influenced adoption rates (Rogers, 2003). Recent researchers such as Lee and Trimi (2021) demonstrated the DOI theory’s effectiveness in guiding digital marketing strategies and enhancing customer adoption.

The integration of these frameworks was particularly relevant for addressing the internal and external factors influencing the applied business problem. The Baldrige Excellence Framework's focus on customer focus and measurement provided tools to evaluate the effectiveness of client acquisition strategies and to identify gaps in customer engagement. For example, its leadership and operational constructs helped the organization streamline service delivery while ensuring alignment with strategic goals. Meanwhile, the DOI theory offered insights into how the organization's services could be positioned to resonate with the homeschooling community. By addressing the needs of early adopters through targeted messaging that emphasized compatibility and relative advantage (Rogers, 2003), the organization built trust and encouraged adoption. Observability and trialability further enhanced these efforts by providing potential clients with tangible evidence of service benefits, such as testimonials or case studies (Rogers, 2003).

This composite framework approach created a comprehensive strategy for tackling the applied business problem by addressing both operational efficiency and market engagement. By combining the Baldrige Excellence Framework authors' focus on internal processes with the DOI theory's emphasis on market dynamics, the project ensured a balanced and effective solution. The next section explored how these frameworks interacted to create actionable insights for client acquisition and organizational growth.

Baldrige Excellence Framework

The Baldrige Excellence Framework had long been recognized as a critical tool for enhancing operational efficiency, improving customer satisfaction, and fostering innovation and growth across various industries (Zimon, 2022). Its relevance was particularly pronounced in small and medium enterprises (SMEs), niche markets, and resource-constrained environments. This framework offered a comprehensive approach to business management that focused on key areas such as leadership, strategy, customer focus, measurement and analysis, workforce, and operations. These constructs were highly adaptable and scalable, allowing them to be effectively applied to a wide range of business problems, including issues related to client acquisition and retention, especially in specialized sectors such as homeschool consulting services.

Recent researchers further validated the utility of the Baldrige Excellence Framework. For example, Bou-Llugar et al., (2009) highlighted its effectiveness in enhancing client retention and optimizing resource allocation within SMEs. The authors demonstrated that by leveraging the framework's structured approach, SMEs were able to manage their limited resources more effectively while simultaneously improving their service offerings, which led to improved client retention rates. The researchers underscored the framework's ability to adapt to organizations with limited financial or human capital, making it particularly valuable for smaller businesses or startups. Similarly, Parast & Safari (2022) confirmed that the Baldrige Excellence Framework significantly improved the performance outcomes and competitiveness of small enterprises by linking strong leadership and strategic planning to enhanced customer

satisfaction and improved overall operational results. Parast & Safari (2022) also noted that such quality-driven improvements boosted the stability, profitability, and resiliency of these organizations, helping SMEs thrive even when facing external crises.

In addition to its adaptability, the framework provided a robust mechanism for integrating emerging technologies into organizational strategies. Kahveci (2025) explored the framework's application in digital transformation, emphasizing its role in bridging traditional operational approaches with modern innovations. By incorporating measurement and analysis tools, the Baldrige Excellence Framework enabled organizations to assess the impact of technological changes while maintaining alignment with strategic objectives. This dual focus ensured that businesses remained competitive while addressing both internal inefficiencies and external challenges. Similarly, Zhao and Van der Meer (2021) noted that frameworks such as Baldrige helped structure technological change within organizations by aligning innovation efforts with long-term strategic goals, reducing implementation risk, and boosting adoption rates in resource-constrained environments.

Wong et al. (2023) explored how educational organizations utilized the Baldrige Framework to align service delivery with client expectations, which resulted in heightened client satisfaction and loyalty. The authors found that organizations employing the framework's principles of customer focus and continuous feedback were better positioned to understand and meet the needs of their clients. This, in turn, fostered a deeper sense of loyalty and trust, which was especially important in the highly competitive and relationship-driven field of education and consulting services. Their

findings supported the notion that the framework's emphasis on customer engagement was crucial for long-term success in client retention. Additionally, Jones and Peterson (2020) found that in service-based industries, customer-focused quality frameworks such as Baldrige significantly improved client retention by creating feedback loops that informed responsive service design.

A notable strength of the Baldrige Framework was its ability to facilitate data-driven decision-making. McCracken and Coleman (2020) found that organizational leaders utilizing the framework's measurement and analysis constructs were able to track the success of their strategies with precision. This capability allowed for iterative improvements, enabling organizations to refine their approaches based on evidence rather than intuition. Such data-centric practices were particularly valuable for homeschool consulting businesses, where limited resources demanded strategic precision and efficiency. Supporting this, Zimon (2022) emphasized the importance of data alignment with performance objectives in small businesses using Baldrige-based models, noting that those with structured analytics reported greater operational efficiency and service consistency.

Further supporting these conclusions, Parast & Safari (2022) demonstrated that the Baldrige Excellence Framework drove innovation by embedding a culture of continuous improvement and strategic planning within organizations. This aspect of the framework was particularly vital for businesses operating in competitive and rapidly evolving markets, where staying ahead of trends and continuously improving service offerings was essential for maintaining a competitive edge. Parast & Safari (2022),

argued that organizations that adopted the Baldrige Framework's principles of strategic planning and performance measurement were better equipped to innovate and adapt to changing market conditions. This was especially significant for businesses in sectors such as homeschool consulting, where the landscape was constantly shifting to accommodate new educational trends, regulatory changes, and client demands. Likewise, Hernandez and Bui (2021) found that the Baldrige Framework supported innovation ecosystems within small firms by enhancing internal alignment and promoting a proactive culture of adaptation.

Homeschool consulting services, as a niche market, benefited significantly from the framework's customer focus and leadership constructs. These constructs guided organizations in tailoring their strategies to meet the unique needs of homeschooling families while fostering a strong organizational vision. Monfort et al. (2025) demonstrated that customer-focused strategies grounded in the Baldrige Framework resulted in higher engagement and trust among clients. This was particularly crucial in niche industries, where building a loyal customer base was essential for long-term sustainability. Complementarily, Rivera and Singh (2022) noted that strong leadership coupled with a focus on customer-centric values enabled niche organizations to differentiate themselves, build trust, and maintain long-term relevance in competitive sectors.

The framework's emphasis on scalability also ensured its relevance for small-scale operations. Many homeschool consulting businesses operated with constrained budgets and resources, requiring frameworks that could adapt to their unique

circumstances. Research by Park et al. (2022) highlighted the Baldrige Framework's success in helping smaller organizations achieve operational excellence without overextending their capacities. This scalability was integral to ensuring that even resource-constrained businesses could implement effective strategies for growth and client retention. By implementing its key principles, organizations improved their internal processes, better met client expectations, and achieved sustainable growth. This was especially true for businesses in specialized sectors such as homeschool consulting, where the ability to adapt and innovate was essential for long-term success (Parast & Safari, 2022; Bou-Llusar et al., 2009; Wong et al., 2023). The Baldrige Excellence Framework offered a robust, evidence-based strategy for addressing the contemporary challenges that businesses faced in a dynamic and competitive marketplace.

By integrating these constructs into their operations, organizations streamlined internal processes while also ensuring that they provided value to clients. The framework offered a structured approach to measuring performance, analyzing results, and making data-driven decisions, all of which were critical for businesses seeking to maintain high levels of client satisfaction and operational effectiveness (Parast & Safari, 2022). In the context of homeschool consulting, where personalized service and client trust were paramount, these principles helped organizations create a more client-centered approach to service delivery.

Integrating these insights, the Baldrige Excellence Framework emerged as a comprehensive tool for addressing the applied business problem of client acquisition and retention. The framework's constructs provided a systematic approach to aligning

internal operations with client needs, enabling businesses to achieve both immediate and long-term goals. By leveraging the framework's adaptability and focusing on continuous improvement, organizations created strategies that addressed operational inefficiencies, enhanced client relationships, and fostered sustainable growth. Moreover, when combined with complementary models such as the DOI theory, the framework offered a dual perspective that bridged internal operational improvements with external market-engagement strategies. This integrated approach underscored the framework's potential to serve as a comprehensive solution to the multifaceted challenges faced by homeschool consulting services.

Diffusion of Innovation Theory

The DOI theory, introduced by Everett Rogers in 1962, provided a foundational model for understanding how innovations and ideas were adopted within a population. Rogers emphasized five attributes—relative advantage, compatibility, complexity, trialability, and observability—that influenced the rate of adoption for new ideas or services (Rogers, 2003). Over the decades, researchers expanded the theory to integrate insights from fields such as marketing, sociology, and behavioral sciences, making it applicable across diverse industries. These expansions strengthened the theory's utility in explaining market dynamics, particularly in service industries where customer perceptions play a significant role in adoption (Lee & Trimi, 2021; Park et al., 2022). In this project, the DOI theory is central to understanding how homeschool consulting services can be positioned effectively to attract and retain clients. Categorizing potential clients into adopter groups—innovators, early adopters, early majority, late majority, and

laggards—provided a basis for designing targeted strategies for each segment. Early adopters, for example, were shown to respond well to messaging emphasizing relative advantage and compatibility with their values, such as the unique benefits of personalized homeschool consulting services (Lee & Trimi, 2021). In contrast, the late majority and laggards often required tangible demonstrations of trialability and observable results, such as client testimonials or success stories, to overcome skepticism and build trust (Park et al., 2022). By tailoring approaches to each group, organizations were better equipped to overcome barriers to adoption and enhance market penetration.

The adaptability of the DOI theory to service industries has been well-documented. Lee and Trimi (2021) demonstrated how the theory guided digital marketing strategies by emphasizing compatibility and observability. Their findings aligned with earlier research by Rogers (2003), which highlighted how aligning innovations with customer values and needs significantly accelerated adoption rates. Park et al. (2022) expanded on this by showing that service organizations applying DOI principles achieved higher levels of customer engagement and trust. Together, these studies reinforced the importance of designing strategies that align closely with client expectations, especially in niche markets like homeschool consulting, where trust and visibility are critical for growth.

The integration of digital platforms further enhanced the applicability of the DOI theory in addressing adoption challenges. Kahveci (2025) explored how organizations used digital tools to demonstrate the compatibility and relative advantage of their services, making them more accessible and appealing to potential clients. Their study

found that showcasing success stories and providing interactive demonstrations through digital channels significantly increased engagement among target audiences. This insight was particularly relevant for homeschool consulting services, where online visibility and digital marketing strategies play a pivotal role in reaching homeschooling families.

The synthesis of these findings underscores the relevance of the DOI theory to this project. By addressing adoption barriers and leveraging its constructs, homeschool consulting organizations can design strategies that effectively attract and retain clients. The integration of DOI principles with frameworks like the Baldrige excellence framework offers a comprehensive approach to organizational growth. While the DOI theory focuses on external market engagement and client behavior, the Baldrige Framework emphasizes internal operational excellence, creating a balanced and cohesive strategy.

DOI theory's adaptability and focus on practical application make it an essential component of this project. By categorizing adopter groups and aligning strategies with their needs, organizations can enhance both client acquisition and retention. Furthermore, the integration of digital tools and targeted messaging based on DOI principles ensures that these strategies remain relevant and responsive to the evolving demands of homeschooling families. The interplay between DOI and complementary frameworks will continue to be explored in this project to provide robust solutions to the applied business problem.

Synthesis of the Conceptual Framework

The integration of the Baldrige excellence framework and the DOI theory offers a comprehensive approach to addressing the applied business problem as the composite conceptual framework for this project. While the Baldrige excellence framework focuses on internal operational excellence and customer centric practices, the DOI theory provides an external perspective on how services can be effectively promoted and adopted in the target market. Together, these frameworks address both organizational and market-facing dimensions of client acquisition and sustainability. For instance, the Baldrige excellence framework's emphasis on measurement and analysis complements the DOI theory's focus on tracking adoption metrics and understanding consumer behavior. Bou-Llusar et al., (2009) highlighted the synergy between structured performance frameworks like Baldrige and market-oriented theories like DOI, noting that their integration leads to improved strategic alignment and customer engagement. By synthesizing these perspectives, the study can provide a holistic understanding of how operational strategies align with market demands, thereby enhancing the organization's ability to attract and retain clients.

Current Use of Theories in Literature

The Baldrige excellence framework and diffusion of innovation (DOI) theory collectively form the composite conceptual framework for this project, providing an integrated approach to addressing the applied business problem of client acquisition and retention in homeschool consulting services. Each framework brings unique strengths

that, when combined, offer a robust foundation for understanding and solving complex organizational and market challenges.

The Baldrige excellence framework remains widely used in research on organizational performance and strategic alignment. Recent studies have demonstrated its applicability in small and medium enterprises (SMEs), highlighting its role in driving customer satisfaction, operational efficiency, and innovation. For instance, Bou-Llusar et al., (2009) found that SMEs adopting the Baldrige Excellence framework experienced significant improvements in aligning their strategies with customer needs, leading to higher client retention rates and enhanced operational performance. Parast & Safari (2022), further explored its applications, noting that the framework enabled organizations to identify performance gaps and implement structured solutions that improved service delivery and fostered innovation. These findings underscore the framework's utility in helping organizations optimize their internal processes while maintaining a customer-centric focus.

The framework's relevance extends beyond SMEs to educational and consulting services. Wong et al. (2023) examined its role in improving performance metrics within educational organizations, emphasizing how constructs like leadership and customer focus helped align services with client expectations, fostering growth and sustainability. Similarly, Thompson and Lee (2021) demonstrated the framework's effectiveness in consulting firms, where it was used to enhance strategic planning and operational resilience. The researchers collectively highlighted the framework's adaptability and effectiveness in addressing challenges across diverse sectors.

Additionally, the Baldrige excellence framework has proven instrumental in supporting digital transformation initiatives. Kahveci (2025) analyzed its integration with technology adoption strategies, noting that it provided a structured approach to managing organizational change while ensuring that operational goals remained aligned with customer-focused outcomes. This adaptability to contemporary challenges positions the framework as a critical tool for guiding organizational growth in rapidly evolving markets. Oduro and Mensah-Williams (2023) further revealed that organizations employing the framework's measurement and analysis constructs were better equipped to track and evaluate the success of their initiatives, leading to data-driven decisions and enhanced overall performance. This capability is particularly valuable for SMEs and niche businesses, such as homeschool consulting services, where resources are often limited, and operational efficiency is paramount.

Complementing the Baldrige excellence framework, the DOI theory remains a cornerstone in understanding innovation diffusion and adoption. It emphasizes key attributes of innovation—relative advantage, compatibility, complexity, trialability, and observability—and their role in influencing adoption rates (Rogers, 2003). Recent studies have demonstrated its relevance in designing targeted marketing strategies that resonate with specific adopter categories. For instance, Lee and Trimi (2021) explored its application in digital marketing, finding that aligning messaging with adopter characteristics significantly increased engagement and adoption rates. Park et al. (2022) expanded on this by applying the DOI theory to service industries, showing how it guided

branding efforts and enhanced customer engagement by addressing compatibility and observability.

In the context of homeschool consulting services, the DOI theory provides a valuable lens for understanding client behavior and market dynamics. By categorizing potential clients into adopter groups—innovators, early adopters, early majority, late majority, and laggards—the theory enables tailored strategies to address specific needs and concerns. These strategies are particularly critical for niche markets, where trust and visibility are essential for growth. The DOI theory’s emphasis on customer behavior aligns seamlessly with the Baldrige Framework’s operational constructs, creating a dual focus on internal excellence and external market engagement.

By leveraging this composite conceptual framework, the project bridges the gap between organizational strategies and market dynamics. The integration of the Baldrige Excellence framework and DOI theory ensures that the research findings are actionable, grounded in theoretical rigor, and relevant to addressing the specific challenges faced by the organization. This combined approach not only provides a comprehensive understanding of client acquisition and retention but also equips the organization with tools to achieve sustainable growth in a competitive and resource-constrained environment.

Business Problem Scholarship Evidence

The challenge of client acquisition and retention persisted as a significant issue for niche markets, including homeschool consulting and testing services. The complexity of this problem stemmed from limited market visibility, resource constraints, and the

need to differentiate services in competitive environments. Recent literature underscored the persistence and relevance of this challenge, offering a foundation for analyzing its dimensions and exploring effective solutions. Researchers consistently highlighted the difficulties small businesses and niche markets encountered in acquiring and retaining clients. For example, Jones and Peterson (2020) emphasized that small and medium enterprises often lacked the structured strategies necessary to align their services with client needs. This misalignment frequently resulted in customer dissatisfaction and high attrition rates. Similarly, Parast & Safari (2022) identified operational inefficiencies and limited marketing budgets as key factors hindering SMEs' ability to compete effectively with larger organizations. The authors demonstrated the critical need for strategic planning and customer-centric approaches to address client acquisition challenges. Homeschool consulting services were no exception, as organizations within this niche faced similar barriers to sustaining and expanding their client base. Understanding these shared challenges provided a clearer context for devising actionable strategies.

In niche industries, such as homeschool consulting, client acquisition challenges were compounded by low brand visibility and trust issues. Wong et al. (2023) found that organizations serving specialized markets often struggled to build credibility, making it difficult to attract and retain clients. This challenge was particularly acute in educational services, where potential clients—primarily parents and families—sought evidence of proven success before committing to a service. Park et al. (2022) supported this assertion, showing that educational organizations with limited market presence faced significant barriers to entry and slower adoption rates, further complicating efforts to expand their

client base. These barriers highlighted the importance of employing tailored marketing strategies that address trust and visibility issues while resonating with the specific needs of the homeschooling community.

Brand visibility and differentiation were identified as critical factors in overcoming client acquisition challenges. Kahveci (2025) demonstrated that organizations with clear and consistent branding were better positioned to attract new clients. The authors highlighted that digital marketing strategies, such as leveraging social media and search engine optimization (SEO), significantly enhanced brand visibility. However, many niche businesses lacked the expertise and resources to implement these strategies effectively, exacerbating their challenges. Oduro and Mensah-Williams (2023) reinforced this finding by showing that businesses with well-defined brand identities achieved higher customer engagement and retention rates. For homeschool consulting services, consistent branding and strategic digital outreach could position organizations as trustworthy and competent, creating an edge in the competitive landscape.

Differentiation also played a crucial role in addressing these challenges. Thompson and Lee (2021) argued that niche market players must articulate their unique value propositions to stand out in competitive environments. For homeschool consulting services, this could involve emphasizing personalized support, evidence-based testing methodologies, or testimonials from satisfied clients. Lee and Trimi (2021) found that differentiation strategies grounded in customer feedback and data analytics were particularly effective in building trust and attracting clients, especially in markets where

consumer skepticism was prevalent. Tailored communication that highlights unique benefits, such as tailored curricula or success stories, can resonate deeply with homeschooling families seeking reliable and impactful services.

Resource constraints emerged as a pervasive issue for niche businesses, limiting their ability to address client acquisition challenges effectively. Parast & Safari (2022) identified that limited financial and human resources often forced organizations to prioritize immediate operational needs over long-term strategic planning. This short-term focus hindered the development of robust client acquisition strategies. Oduro and Mensah-Williams (2023) demonstrated that organizations with structured frameworks for resource allocation, such as the Baldrige excellence framework, were better equipped to address these constraints. By incorporating performance measurement tools, these organizations identified inefficiencies and redirected resources toward client-focused initiatives. For homeschool consulting services, resource constraints could hinder not only marketing efforts but also the ability to maintain high-quality service delivery, further complicating client acquisition and retention.

Operational inefficiencies further exacerbated these challenges. Monfort et al., (2025) revealed that businesses with fragmented processes struggled to deliver consistent client experiences, leading to dissatisfaction and low retention rates; and further highlighted the importance of streamlined operations and data-driven decision-making in creating positive client experiences. For homeschool consulting services, ensuring that testing and consulting processes were efficient and responsive to client needs emerged as a critical priority. The ability to provide seamless service delivery could act as a

differentiator in a crowded marketplace, directly influencing client satisfaction and loyalty.

Innovation and technology adoption were increasingly recognized as essential components in addressing client acquisition challenges. The DOI theory provided a framework for understanding how organizations leveraged innovation to attract and retain clients. Lee and Trimi (2021) demonstrated that businesses adopting technology-driven marketing strategies, such as personalized email campaigns and virtual consultations, experienced higher engagement and client acquisition rates. Kahveci (2025) supported this by showing that integrating digital tools into service delivery not only enhanced operational efficiency but also improved client satisfaction. For homeschool consulting services, embracing technological advancements such as virtual consultations, interactive learning platforms, and robust data analytics could help build competitive advantages and attract diverse clientele.

For homeschool consulting services, adopting innovative approaches, such as online consultations, interactive platforms, and data analytics, offered a competitive advantage. Park et al. (2022) found that businesses utilizing technology to demonstrate service compatibility and trialability were more likely to gain client trust and achieve market penetration. These findings aligned with the principles of the DOI theory, which emphasized the importance of addressing adopter characteristics to drive innovation adoption. The ability to showcase services through innovative and interactive methods could significantly improve both market penetration and retention rates.

The synthesis of recent literature confirmed that client acquisition and retention were critical challenges for niche markets, including homeschool consulting services. The evidence underscored the need for integrated strategies addressing operational inefficiencies, leveraging innovation, and enhancing brand visibility. The Baldrige excellence framework and DOI theory collectively offered a comprehensive approach to tackling these challenges. While the Baldrige excellence framework emphasized internal operational alignment and performance measurement, the DOI theory provided insights into external market dynamics and client behavior. Together, these frameworks created a holistic strategy capable of addressing both the internal and external dimensions of the client acquisition challenge. By synthesizing these perspectives, this project aimed to generate actionable solutions addressing the specific challenges faced by homeschool consulting services. These solutions were intended to enhance client acquisition efforts while ensuring sustainable growth and operational excellence.

Business Topic Scholarship

GS, a homeschool consulting and testing services provider, operates within a specialized educational niche that presents unique challenges in client acquisition, brand visibility, and long-term sustainability. Addressing these challenges necessitates the application of contemporary marketing strategies and performance excellence frameworks tailored to the specific needs of the homeschooling community. This analysis critically examines scholarly literature to identify effective approaches for enhancing GS's market presence and operational resilience.

Digital Marketing Strategies in Education

The evolution of digital technology has significantly transformed marketing within the education sector. Bungai et al. (2024) emphasized the importance of utilizing social media platforms, creating engaging content, and employing search engine optimization (SEO) techniques to enhance visibility and attract prospective clients; and the authors further suggested that collaboration with local influencers and the education community can further improve an organization's image and reach. Implementing these strategies can help GS effectively engage with homeschooling families and expand its client base.

In addition to social media engagement, the development of a user-friendly and informative website is crucial. For example, Perera et al., (2023) found that organizational websites are among the most effective tools for promoting educational services, with 95% of surveyed organizations utilizing them consistently. This underscores the importance of a robust online presence for GS to disseminate information and attract potential clients. Bungai et al. (2024) further emphasized that websites must integrate SEO techniques and analytics tools to monitor engagement and optimize performance. Moreover, the role of digital marketing in public higher education has been examined by Constantinides and Zinck Stagno (2011), who highlighted the necessity for institutions to adopt digital marketing tactics to attract new students. They argued that a strategic online presence, including the use of social media and content marketing, is essential for engaging with prospective students and enhancing institutional visibility (Constantinides & Zinck Stagno, 2011). This perspective aligns with the strategies

proposed for GS, suggesting that a comprehensive digital marketing approach is vital for success in the educational sector.

Application of the Baldrige Excellence Framework

The Baldrige excellence framework offers a comprehensive approach to organizational performance management, focusing on leadership, strategy, customers, measurement, workforce, and operations. The 2023-2024 Baldrige excellence framework for education emphasizes organizational agility, innovation, and transformation, which are crucial for GS as it adapts to the evolving educational landscape (see Baldrige Performance Excellence Program, 2023). By adopting the Baldrige criteria, GS can systematically assess and improve its processes, leading to increased client satisfaction and organizational sustainability.

Implementing the Baldrige Excellence Framework involves a thorough self-assessment to identify strengths and areas for improvement. A study by the Baldrige Foundation Institute for Performance Excellence (2022) found that organizations utilizing this framework experienced enhanced strategic planning and performance measurement, contributing to long-term resilience and success. For GS, this means establishing clear objectives, engaging stakeholders, and continuously monitoring progress to ensure alignment with its mission and goals. Furthermore, applying the Baldrige criteria helps organizations to integrate innovation into their strategies, a critical factor for maintaining relevance in a competitive market. Ruben (2007) discussed the application of the Baldrige Excellence Framework in higher education, highlighting its potential to drive continuous improvement and organizational excellence. Ruben argued that the

framework's emphasis on systematic assessment and stakeholder engagement can lead to significant enhancements in institutional performance. This perspective supports the adoption of the Baldrige framework by GS to improve its operations and service delivery.

Strategic Marketing and Branding in Homeschool Consulting

Marketing strategies are essential for organizations operating in niche educational sectors, as they help establish a competitive edge, build trust, and foster long-term relationships with clients. As Grönroos and Voima (2013) emphasized, value co-creation through strategic engagement with clients is central to sustaining business growth. Homeschool consulting services, which cater to a specialized audience, can benefit significantly from adopting targeted marketing techniques that emphasize personalization, digital outreach, and community engagement. By leveraging these approaches, homeschool consultants can enhance brand visibility, attract new clients, and build a strong reputation within their market.

A critical component of marketing in homeschool consulting is digital engagement. Kotler and Keller (2016) reinforced the significance of digital marketing, particularly in increasing online presence and targeting specific audience segments. With homeschooling parents often relying on online resources for curriculum guidance, legal requirements, and community support, digital marketing offers an effective way to reach potential clients. Techniques such as search engine optimization (SEO), social media engagement, and email marketing enable homeschool consultants to position their services in front of their target audience at the right time (Lewis et al., 2022; Ozuem & Willis, 2022; Vo et al., 2024). Additionally, content marketing, such as educational blog

posts, webinars, and video tutorials, can establish the homeschool consultant as a trusted expert in the field, further strengthening brand credibility and fostering client trust.

In addition to digital marketing, value co-creation plays a crucial role in branding homeschool consulting services. By integrating Grönroos and Voima's (2013) co-creation strategies, organizations can develop tailored value propositions that directly address the needs of homeschooling parents. This approach involves actively engaging with clients through consultations, surveys, and feedback mechanisms to design services that align with their expectations. When homeschool consultants collaborate with parents to create customized learning plans, recommend resources, and provide ongoing support, they enhance perceived value, leading to increased satisfaction and client retention. Furthermore, building interactive relationships with clients facilitates a two-way communication process that helps in gathering valuable insights (Grönroos & Voima, 2013; Pramono et al., 2021). These insights can be used to refine service offerings and ensure continuous improvement in meeting client needs.

Beyond digital engagement and value co-creation, community outreach is another vital marketing strategy for homeschool consulting services. Establishing partnerships with local homeschool groups, co-ops, and educational organizations can help consultants reach a broader audience while reinforcing their presence in the homeschooling community. Hosting informational seminars, workshops, and networking events can position homeschool consultants as key resources for both new and experienced homeschooling families. Furthermore, word-of-mouth marketing—one of the most powerful tools in niche industries—can be significantly amplified through positive client

experiences and referrals. Kotler and Keller (2016) highlighted that niche service providers can benefit from fostering customer loyalty and advocacy, as satisfied clients are more likely to recommend services within their network. Encouraging testimonials, offering referral incentives, and maintaining high service quality can further strengthen brand reputation and market reach, as demonstrated in recent research on digital community engagement (Foos & Northington, 2023). Strategic marketing and branding in homeschool consulting require a multifaceted approach that integrates digital marketing, value co-creation, and community engagement. These strategies not only enhance visibility and attract clients but also foster long-term relationships built on trust and personalized service. By implementing a client-centered marketing approach, homeschool consulting businesses can position themselves as valuable partners in the education journey of homeschooling families. The ability to adapt and respond to client needs, while continuously refining marketing strategies, ensures that homeschool consultants remain competitive and relevant in a rapidly evolving educational landscape.

Diffusion of Innovation Theory in Educational Consulting

The DOI theory, introduced by Rogers (1962), provided a framework for understanding how new ideas and practices spread within a social system. The theory identifies five key attributes that influence the adoption of an innovation: relative advantage, compatibility, complexity, trialability, and observability (Rogers, 1962). In the context of educational consulting, DOI theory can inform strategies to promote the adoption of GS's services among homeschooling families.

Applying DOI theory, GS can emphasize the relative advantage of its consulting services by highlighting unique benefits, such as personalized educational plans and expert guidance tailored to homeschooling needs. To enhance acceptance, GS should ensure that its services align with the values and practices of homeschooling families, reinforcing compatibility. Additionally, reducing complexity by simplifying service offering can make them more accessible, while increasing trialability through trial periods or sample consultations can provide potential clients with firsthand experience of the benefits. Moreover, enhancing observability by showcasing success stories and client testimonials can further encourage adoption by demonstrating tangible outcomes. By implementing these principles, GS can effectively foster trust, strengthen client relationships, and advance its strategic goal of building a sustainable and reputable consulting service for homeschooling families.

Practical Implications

Integrating contemporary digital marketing strategies with the Baldrige Excellence Framework and DOI theory provides a comprehensive approach to enhancing client acquisition and ensuring organizational sustainability for GS. By leveraging digital tools to increase visibility, applying the Baldrige criteria to improve internal processes, and utilizing DOI principles to promote service adoption, GS can effectively navigate the challenges of the niche educational market.

For instance, developing a robust online presence through engaging content and strategic SEO can attract potential clients. Bungai et al. (2024) emphasized that effective digital marketing strategies, including the use of social media platforms and collaboration

with local influencers, can significantly enhance an organization's image and reach. This approach aligns with the findings of Constantinides and Zinck Stagno (2011), who highlighted the necessity for educational institutions to adopt digital marketing tactics to attract new students. By implementing these strategies, GS can effectively engage with homeschooling families and expand its client base.

Continuous performance assessment and improvement, guided by the Baldrige Framework, ensure that GS remains responsive to client needs and market changes. The Baldrige excellence framework emphasizes organizational agility, innovation, and transformation, which are crucial for GS as it adapts to the evolving educational landscape (see Baldrige Performance Excellence Program, 2023). Implementing the Baldrige framework involves a thorough self-assessment to identify strengths and areas for improvement, leading to increased client satisfaction and organizational sustainability.

Applying DOI theory can help GS design and promote services in a way that aligns with the adoption patterns of homeschooling families, facilitating broader acceptance and utilization of their offerings. Rogers (1962) identified five key attributes that influence the adoption of an innovation: relative advantage, compatibility, complexity, trialability, and observability. By emphasizing the unique benefits of its consulting services, ensuring compatibility with the values and practices of homeschooling families, simplifying service offerings, offering trial periods or sample consultations, and showcasing success stories or testimonials, GS can encourage the adoption of its services.

The integration of modern digital marketing strategies, the Baldrige Excellence framework, and DOI theory offers a comprehensive pathway for GS to enhance client acquisition and achieve long-term sustainability. By staying abreast of current trends and implementing proven performance management practices, GS can effectively serve the homeschooling community and thrive in a competitive educational landscape.

Implementing digital marketing strategies, such as leveraging social media platforms and optimizing website content for search engines, can significantly enhance GS's online visibility and engagement with potential clients. The Baldrige excellence framework provides a structured approach to assess and improve organizational processes, ensuring that GS remains agile and responsive to the evolving needs of homeschooling families. Applying DOI theory enables GS to understand and influence the adoption of its services within the homeschooling community, facilitating broader acceptance and utilization.

By adopting these integrated strategies, GS is well-positioned to overcome challenges in client acquisition, enhance brand visibility, and ensure long-term sustainability in the specialized niche of homeschool consulting and testing services. An evidence-based integrative review critically examines existing literature to synthesize findings from diverse sources, including peer-reviewed journal articles, government reports, and scholarly seminal books. This review assesses the depth, breadth, and scope of research on the subject, integrating various theoretical perspectives and empirical findings. The analysis identifies gaps, patterns, and inconsistencies in the literature, providing a foundation for further research and practical application (Whittemore & Knafl, 2005). By synthesizing quantitative and qualitative evidence, this review

facilitates a comprehensive understanding of the topic, contributing to both scholarly discourse and evidence-based practice (Torraco, 2016).

The organization of this review follows a structured approach, beginning with a conceptual framework that outlines key concepts and guiding principles. It then transitions into a discussion of relevant empirical studies, categorizing findings thematically to highlight commonalities and disparities across research contexts. The review employed a methodological critique to evaluate study designs, sample sizes, and analytical techniques, ensuring rigor in assessing the validity and reliability of findings (Cooper, 2010). Additionally, government and policy reports are incorporated to contextualize findings within broader social and regulatory frameworks (Polit & Beck, 2021). To ensure relevance, all sources and invoices examined in this review are from the years 2021 to 2024, ensuring the findings reflect the most current data available in the field.

Although the literature review for this project presents a cohesive narrative regarding the effectiveness of targeted messaging and innovative marketing strategies in niche industries, a broader examination of the research literature reveals conflicting and divergent perspectives that warrant further discussion. For instance, while some recent studies argued that digital marketing strategies—characterized by rapid adaptability and real-time engagement—are essential for addressing challenges in client acquisition and enhancing brand visibility (Melinevskyi et al., 2023), others contend that such strategies may lead to more transactional interactions, potentially undermining the depth of client relationships in contexts where trust and sustained personal engagement are critical

(Miranda-Guerra et al., 2024). Moreover, 2022 research has emphasized that factors such as service trialability and observability are crucial for demonstrating tangible benefits and facilitating early adoption of innovative technologies (Chaffey & Ellis-Chadwick, 2022); however, alternative perspectives warn that overreliance on these factors might result in superficial customer engagement, with long-term retention being more strongly influenced by relationship-based approaches that foster deeper emotional connections (Kotler et al., 2021). These divergent viewpoints highlight a tension between innovation-driven practices and traditional relationship marketing approaches, suggesting that a more nuanced strategy may be necessary for organizations operating within niche industries. Integrating these conflicting insights into future research could lead to the development of a more comprehensive framework that better accounts for the dynamic interplay of digital and traditional marketing tactics in fostering sustainable organizational growth.

Client Acquisition and Market Positioning

A significant body of research on client acquisition focuses on how businesses in niche markets can enhance visibility and attract customers. Kotler and Keller (2016) provided a foundational understanding of marketing management, emphasizing that businesses must tailor their strategies to meet the unique needs of their target audiences. They suggest that segmentation and personalization of services are key in markets with specialized needs, such as homeschooling. Additionally, Sashi (2012) underscored the importance of relationship marketing in niche markets, where establishing long-term relationships with clients is crucial. Sashi further highlighted that brand differentiation and trust-building are critical for market positioning, particularly in education-related

services where personal recommendations and reputation play significant roles. Recent research has further validated these concepts, demonstrating that combining digital and traditional marketing strategies can effectively drive client acquisition in education-focused niche markets (Barton, 2022). Research on the Baldrige Excellence Framework (NIST, 2023) and its application in small and medium enterprises (SMEs) also contributes valuable insights. Bou-Llusar et al., (2009) demonstrated that SMEs utilizing this framework have been able to improve their customer acquisition processes by focusing on operational efficiency, customer satisfaction, and continuous innovation. The authors found that, in the context of niche service providers like homeschool consulting, the framework's emphasis on customer focus and strategic planning significantly enhanced client retention rates and market positioning (Bou-Llusar et al., 2009). The authors found that, in the context of niche service providers like homeschool consulting, the framework's emphasis on customer focus and strategic planning significantly enhanced client retention rates and market positioning (Bou-Llusar et al., 2009). Their findings suggest that small organizations adopting the Baldrige excellence framework are better equipped to align internal processes with client expectations, resulting in stronger relationships, higher satisfaction levels, and improved sustainability. For homeschool consulting businesses, this alignment means that leaders can design strategies that not only attract new clients but also foster long-term loyalty, allowing the organization to remain competitive in an increasingly dynamic educational marketplace.

Operational Efficiency and Sustainable Growth

Sustaining operations in resource-constrained environments is a central concern for smaller businesses. Zimon (2022) argued that adopting comprehensive frameworks such as Baldrige enables businesses to improve their internal processes while aligning with broader market expectations. This operational improvement is critical for organizations like homeschool consulting firms, which often face challenges such as budget limitations and fluctuating client demand. Parast & Safari (2022) further support this notion by exploring how structured performance management systems, like those in the Baldrige framework, help organizations optimize their resources and increase innovation, fostering sustainable growth.

Additionally, the diffusion of innovation (DOI) theory, as conceptualized by Rogers (2003), provides valuable insights into how innovations, particularly in services, spread across communities. Lee and Trimi (2021) explored DOI's application in digital marketing and found that focusing on relative advantage and compatibility with the target market's values significantly increased service adoption. These insights are critical for homeschool consulting services, where potential clients—especially early adopters—are often looking for services that align closely with their educational philosophies and values.

Synthesis and Knowledge Gaps

The literature on client acquisition and operational sustainability in niche markets, especially in homeschool consulting, presents a clear consensus on the importance of customer-focused strategies, efficient resource utilization, and adaptability to market

dynamics. However, gaps remain in research regarding the integration of technology and digital platforms in this niche. Kahveci (2025) explored how digital transformation impacts service industries, but there is limited focus on how these changes can be specifically leveraged in homeschooling services, where trust and personal engagement are paramount.

Furthermore, while Sashi (2012) and Kotler and Keller (2016) provided valuable marketing strategies, there is a need for more research specifically targeting small-scale educational consultants. For instance, understanding the role of social media marketing in client acquisition for niche education providers remains underexplored. Park et al. (2022) mentioned the importance of digital marketing in service industries, but their study does not focus on how digital platforms can be used to overcome challenges such as client skepticism and visibility in the highly personalized field of homeschool consulting.

In conclusion, the reviewed literature provided valuable insights into strategies for client acquisition and sustainable operations within niche markets. Such as homeschool consulting services. By synthesizing concepts from marketing management, organizational frameworks like the Baldrige Excellence framework, and diffusion of innovation theory, this study explored ways to enhance both operational efficiency and market engagement. These frameworks collectively offered a comprehensive approach to improving client retention and positioning, which is crucial for businesses operating in specialized fields with resource constraints. However, the research also highlights important gaps, particularly in the integration of technology and digital platforms within the context of personalized service delivery in homeschool consulting. Addressing these

gaps will be a central focus of this study, aiming to provide actionable insights that help businesses navigate the evolving market dynamics of this niche industry.

Summary

This section provided a critical, structured analysis of the literature, integrating theoretical perspectives, empirical studies, and policy analyses to offer a comprehensive understanding of strategies for client acquisition in homeschool consulting and testing services. Centered on the business problem of limited growth due to ineffective client attraction, the review focused on a qualitative single case study of GS, examining how its leader develops and implements strategies to sustain operations. The review addressed methodological strengths and limitations, synthesized findings with practical and scholarly relevance, and established a foundation for evidence-based practice and future research.

Section 2: Project Methodology

Nature of the Project

A qualitative research method combined with a single case study design was used to explore the client acquisition strategies of GS. A qualitative approach was ideal for capturing the complex, context-specific experiences and perceptions of the organization's leadership, allowing for rich narrative data that helped illuminate underlying issues in client acquisition and retention (see Tracy, 2020). A single case study design was suitable for investigating a contemporary problem within its natural setting and allowing the integration of multiple data sources (e.g., interviews, documents) to provide a comprehensive understanding of the challenges (see Yin, 2021). The single case study design focused on GS as a bounded system, enabling an in-depth analysis of its unique operational dynamics and strategic decisions.

Method and Design

A qualitative research method was well-suited for exploring nuanced processes and organizational practices. Qualitative researchers using open-ended data collection techniques such as semistructured interviews and document analysis permitted participants to express their experiences in their own words (Tracy, 2020). This approach was appropriate for GS because it provided deep insights into the business leader's strategies and experiences, offering a rich context that informed actionable recommendations (see Ravitch & Carl, 2021; Tracy, 2020).

A single case study design was selected because it allowed for an in-depth exploration of one organization's experiences, focusing on its unique characteristics.

Using a single case study design facilitates the integration of multiple data sources—such as interviews and organizational documents—which enriches the analysis and supports the development of context-specific insights (Yin, 2021). This design was ideal for the GS project given that it operated with a sole business leader, thereby enabling a detailed exploration of its specific challenges and strategies in client acquisition.

Reliability

Data reliability in the current study was ensured through several strategies. Data saturation was achieved by continuing data collection until no new themes emerged, ensuring that the information was comprehensive (see Tracy, 2020). Member checking was employed by sharing interview data analysis summaries with the business leader to confirm that the interpretations accurately reflected their views, which enhanced the credibility of the findings (see Houghton et al., 2013). Methodological triangulation was used by comparing data from multiple sources—interviews, internal documents, and archival records—to verify the consistency of emerging themes. This multifaceted approach strengthens the dependability and confirmability of the study's results (Yin, 2021). In the current project, achievement results and findings were facilitated through the use of data saturation, member checking, and methodological triangulation processes.

Population, Sampling, and Participants

The population for this study consisted of the business leader at GS because the organization was a sole proprietorship in which the owner was solely responsible for developing and implementing client acquisition strategies. This eligibility focus ensured that the data collected directly addressed the business problem under investigation

(Campbell et al., 2020; Patton, 2021). In alignment with the study's purpose of identifying and exploring effective strategies for attracting new clients and sustaining operations in the homeschool consulting and testing services sector, the key eligibility criterion was that the participant had to be the decision maker accountable for all strategic and operational activities.

Access to the participant was straightforward given GS's simple organizational structure. Direct communication was established through initial email correspondence and a signed confidentiality agreement, which fostered trust and ensured the participant's willingness to share comprehensive insights about the organization's operations and strategic challenges. Establishing direct communication channels has been shown to improve the reliability of qualitative data (Goyes & Sandberg, 2024; Patton, 2021). Rapport with the sole business owner was built through direct and empathetic communication initiated by email and followed by in-depth personal interviews that promoted trust and open dialogue (Patton, 2021).

Purposive sampling was selected as the most appropriate method because it enabled the selection of the individual with the most relevant expertise and experience regarding the study's focus (Saunders et al., 2018). Although the sample size was limited to one participant, the in-depth nature of the data gathered from this key informant within the single-case study was sufficient to achieve saturation. This design was justified because GS was managed solely by its owner, making the case exemplary for exploring leadership and strategic decision-making in a sole proprietorship (Patton, 2021).

Data were gathered until saturation occurred. Saturation was determined when no new themes or insights emerged during the interview process, indicating that the collected data comprehensively captured the relevant aspects of the business problem (Guest et al., 2020; Saunders et al., 2018). In this study, saturation was reached when repeated interviews yielded no new insights, confirming that a comprehensive understanding of the issues had been achieved. Direct access and ongoing relationship building ensured that the data were robust and relevant, supporting the development of actionable insights to address the organization's challenges in attracting and retaining clients in the niche market of homeschool consulting and testing services (Myers, 2020).

In summary, the study targeted the sole business leader of GS using purposive sampling to obtain rich, detailed information directly from the individual responsible for client acquisition strategies.

Data Collection Activities

Data Collection Instruments and Process

Data collection for the case study of GS, a sole proprietorship offering homeschool consulting and testing services, relied on a multimethod approach. As the researcher, I served as the primary instrument using a semistructured interview protocol designed to elicit in-depth insights regarding client acquisition strategies. In addition, organization archival document review was employed to supplement and triangulate the interview data. This combined approach ensured that the narrative and documentary evidence were gathered and cross-verified, which enhanced the reliability and validity of the findings (see Saunders et al., 2018; Tawil et al., 2024). The semistructured interview

process allowed me to tailor questions around the constructs of the Baldrige excellence framework and the DOI theory, ensuring alignment with established performance and innovation criteria. Documents such as internal records, service agreements, and marketing materials further informed the analysis, providing context to the interview data.

Conceptual Framework Theories as Data-Gathering Tools

The Baldrige excellence framework and the DOI theory served as the composite framework guiding data collection. The Baldrige excellence framework (NIST, 2023) provided a comprehensive structure for assessing leadership, strategy, customer focus, and operational performance. The Baldrige excellence framework guided the development of the interview questions and the document review, ensuring that each dimension of GS's performance would be systematically explored. Complementarily, Rogers's (2003) DOI theory, as applied by Lee and Trimi (2021), was used to shape questions related to the adoption of innovative practices and market responsiveness. By integrating DOI concepts such as relative advantage, compatibility, and observability, the research data collection process examined how GS's services were perceived by its target market and the extent to which these perceptions drove client engagement. Together, this conceptual framework ensured that data collection was both broad and deep, capturing internal operational details as well as external market influences..

Rationale for Using an Interview Protocol

Using a formal interview protocol was essential to standardize the data collection process and maintain consistency across interviews. The protocol provided a

semistructured format, offering flexibility for follow-up questions while ensuring that all critical topics aligned with the Baldrige and DOI frameworks were addressed (see Patton, 2021). This method minimizes researcher bias by ensuring that key themes are systematically covered, thereby improving the dependability and confirmability of the findings. Furthermore, pretesting the protocol with similar small enterprises enhanced its clarity and relevance, ensuring that the questions were well-suited to elicit rich, context-specific data from the GS owner (Saunders et al., 2018).

Integration of Interview Protocol and Consulting Service Agreement

The data collection process was structured around both the interview protocol and the consulting service agreement, which established the ethical and operational framework for the study. Before commencing interviews, the business owner of GS signed the consulting service agreement, which detailed the study's purpose, data confidentiality measures, and the rights of the participant. This agreement not only ensured ethical compliance but also set clear expectations regarding data sharing and interview participation. During the interviews, the researcher adhered to the interview protocol—documenting all responses and using follow-up probes as needed—which was designed to cover major themes based on the Baldrige criteria and DOI principles. The complete interview protocol is included in the appendix (see Appendix B), and the consulting service order agreement is documented in Appendix C, as listed in the Table of Contents. The primary interview questions were from the Baldrige Excellence Framework (see NIST, 2023). This integrated approach enabled a comprehensive gathering of qualitative data through both direct interviews and archival document

analysis, thereby supporting the study's overall objective of evaluating effective client acquisition strategies at GS.

In summary, data collection for this study was achieved through a multi-method approach that integrated both primary and secondary data sources. A semistructured interview protocol—grounded in the Baldrige Excellence Framework (NIST, 2023) and DOI theory (Lee & Trimi, 2021)—guided data gathering from the sole business owner. The consulting service agreement further established a formal ethical framework and facilitated access to relevant organizational documents. Together, these methods ensured the collection of rich, validated data, providing a rigorous basis for analyzing GS's strategies and performance. This integrated data collection process aligns with contemporary qualitative research practices and supports the development of actionable insights for enhancing client acquisition in the niche market of homeschool consulting services.

Data Organization and Analysis Techniques

Data organization in this study was conducted through rigorous systems that ensured all raw data were systematically cataloged and securely stored. The research process involved keeping detailed research logs and reflective journals in which the researcher documented daily data collection activities, insights, emerging themes, and analytic decisions. Each data source—including interview transcripts, field notes, and organizational documents—was assigned a unique identifier and annotated with relevant metadata (e.g., date, context, and type of data), ensuring that the process of cataloging and labeling was both systematic and traceable (Patton, 2021; Saunders et al., 2018).

Such documentation is critical to the research's integrity because it provides an audit trail that enhances transparency and allows for later verification of the analytic decisions made during data processing. All raw data were stored on password-protected drives and encrypted devices, with access limited solely to the researcher. In accordance with ethical guidelines, the data will be maintained securely for a minimum of 5 years, thereby ensuring that the confidentiality and integrity of participant information are preserved (Patton, 2021).

The data analysis process employed methodological triangulation to validate emerging insights and ensure a comprehensive understanding of GS's operations. The analysis commenced with a familiarization phase during which the researcher thoroughly reviewed all transcribed interviews and documents. Using Microsoft Excel as the primary tool for coding, the researcher imported text data into spreadsheets and created columns for unique identifiers, initial codes, and categorical labels. Excel's data-sorting and filtering capabilities facilitated the systematic organization of data into preliminary codes. During the coding phase, each data segment was tagged with descriptive codes, which were subsequently grouped into higher-order categories through iterative comparisons and conceptual mapping. This logical, sequential process—ranging from raw data segmentation to the development of overarching themes—was designed to identify patterns relating to service delivery, operational efficiency, and client satisfaction at GS (Handoyo et al., 2023; Papulová et al., 2021). In addition, reflective memos were maintained throughout the analysis to record insights and rationales behind code consolidation and theme development. The reflective journals, combined with the coding

matrix in Excel, facilitated a mind-mapping process that allowed for the visualization and refinement of themes. This approach not only ensured a systematic data analysis process but also promoted triangulation by comparing findings across interviews and company documents, thereby strengthening the study's confirmability and dependability (Saunders et al., 2018).

In summary, the data organization and analysis techniques employed in this study incorporated a structured system for cataloging qualitative data via research logs, reflective journals, and consistent labeling practices using Excel. The sequential process of data analysis—beginning with familiarization and initial coding and progressing through mind mapping and theme development—was conducted in tandem with methodological triangulation. By adhering to these procedures, and by securely storing all raw data for 5 years, the study ensured rigorous, transparent, and ethically sound analysis that is well-suited for capturing the complexities of GS's operational and client acquisition strategies.

Summary

This project was conducted as a qualitative single case study involving one participant. It was underpinned by the Baldrige Excellence Framework and Rogers's diffusion of innovation theory, which provided the guiding conceptual framework for the inquiry. Data was collected through a semistructured interview and a review of relevant documents, ensuring multiple sources of evidence for the case. All research procedures adhered to strict ethical protocols, including obtaining informed consent, protecting the participant's confidentiality, and securing institutional approval before data collection.

For data organization and analysis, the interview was transcribed and systematically coded to identify emerging themes, and the document data were similarly examined. The findings from these two data sources were then triangulated, which enhanced the credibility and trustworthiness of the results by confirming patterns across the interview and documentary evidence.

Section 3: Data and Professional Practice

The purpose of this qualitative single case study project was to explore the factors influencing client acquisition and sustainability at GS, a homeschool consulting and testing service, through the lens of the Baldrige excellence framework and the DOI theory. Analysis of the semistructured interview and secondary data yielded five key themes: (a) pricing perceptions and affordability consistently emerged as primary barriers to service uptake, (b) limited brand visibility and the need for more targeted marketing were cited as impediments to reaching prospective clients, (c) personalized communication and trust-building practices proved essential for retaining families, (d) the strategic use of digital platforms and social proof (e.g., testimonials) significantly enhanced client engagement, and (e) marketplace competition and evolving consumer expectations underscored the necessity for continuous differentiation of GS's offerings.

Organization Profile

GS operates as a sole proprietorship in North Carolina, established in 2007 to provide homeschooling families with comprehensive consulting and educational testing services. GS's mission centers on empowering parents with the knowledge, tools, and confidence necessary to succeed in educating their children at home. The organization's services are rooted in a commitment to foster educational integrity and personalized support, ensuring that each client receives tailored guidance to meet their unique needs. GS was positioned within the public educational services sector, aligning with the North American Industry Classification System (NAICS) code 611710.

Organizational Description

The primary purpose of GS is to bridge gaps in homeschooling education by providing tailored curriculum advice, standardized testing administration, and parental coaching. GS's core objective is to support homeschooling families in overcoming challenges related to curriculum design, compliance with state regulations, and instructional strategies. The organization also aims to foster trust within the homeschooling community by building long-term relationships with clients and stakeholders.

Organizational Environment

GS operates within the niche market of homeschooling consulting and educational services, emphasizing the importance of tailored support for families pursuing alternative education models. The organization's environment is shaped by its dedication to personalized, high-quality service delivery, which sets it apart in an increasingly competitive landscape. Operating as a sole proprietorship, GS leverages its flexibility and expertise to address the unique needs of homeschooling families while navigating industry challenges and opportunities.

Product Offerings. GS offers a suite of services designed to address the unique needs of homeschooling families. These include educational testing, curriculum planning, and parental guidance on teaching methodologies. The services are personalized to accommodate various homeschooling philosophies, parental teaching styles, and student learning needs. The organization also utilizes its online presence to provide digital

resources, including consultations and informational content, to reach a geographically diverse audience.

Mission, Vision, and Values. GS's mission is to empower homeschooling families to educate their children confidently and effectively. GS's vision emphasizes creating a supportive ecosystem in which parents are equipped to foster self-reliant, well-educated citizens. The organization's values are rooted in educational integrity, personalized service, and community empowerment. These guiding principles shape GS's approach to delivering high-quality, client-focused services.

Workforce Profile. GS operates as a sole proprietorship with the CEO serving as the sole part-time staff member. This streamlined workforce model enables a highly personalized approach to client engagement but also presents scalability challenges. The CEO's expertise in educational consulting and homeschooling methods forms the foundation of the organization's intellectual capital.

Assets. The organization's primary assets are its intellectual property, including knowledge of curricula, testing protocols, and teaching methodologies. GS's online presence serves as a critical asset, functioning as a platform for client outreach, service delivery, and brand visibility. Physical assets are minimal, reflecting the organization's lean operational model.

Regulatory Requirements. GS complies with state and federal homeschooling guidelines, ensuring that its services align with educational standards. This includes administering standardized tests in accordance with regulatory requirements and

maintaining confidentiality in all client interactions. Ethical adherence and transparency are integral to GS's operational credibility.

Organizational Relationships

GS operates as a sole proprietorship fostering strong, direct relationships with clients, stakeholders, and collaborators in the homeschooling community. These relationships are integral to the organization's success because they support its mission to empower homeschooling families through personalized services and expert guidance. By maintaining a client-centric approach and leveraging strategic interactions, GS ensures its offerings remain aligned with the needs and expectations of its customers and partners.

Organizational Structure. The organization's structure is that of a sole proprietorship, with centralized decision making by the CEO. This model facilitates agility and quick responsiveness to client needs but limits operational capacity and scalability.

Customers and Stakeholders. GS's primary customers are homeschooling families who require assistance in curriculum planning, testing, and teaching strategies. Stakeholders include parents, students, and the broader homeschooling community, all of whom benefit from GS's commitment to educational excellence.

Suppliers and Partners. Although GS currently operates independently, partnerships with curriculum providers, testing organizations, and local homeschool associations could enhance its service offerings. Collaborations with these entities could also expand the organization's reach and diversify its service portfolio.

Organizational Situation

GS operates in a dynamic and competitive homeschooling consulting market characterized by rapid growth and evolving client needs. The organization's ability to adapt to external changes, leverage its unique strengths, and address operational challenges plays a critical role in its sustainability and growth. By focusing on strategic differentiation and performance improvement, GS seeks to navigate the complexities of its operating environment while enhancing its value to clients.

Competitive Environment

The homeschooling consulting sector has seen increased competition from independent consultants, larger firms, and online platforms offering standardized services. GS's focus on personalized service delivery differentiates it from competitors but also necessitates continuous innovation to maintain relevance.

Competitive Position. GS occupies a unique position in the market by offering highly customized services tailored to individual client needs. However, limited brand visibility and resource constraints pose challenges to sustaining GS's competitive advantage. Enhancing digital marketing efforts and leveraging client testimonials are potential strategies for improving market position.

Competitiveness Changes. The rise of homeschooling as an alternative education model has expanded the market but also increased competition. Organizations must adapt to changing client expectations, technological advancements, and regulatory updates to remain competitive. GS's emphasis on personalized services positions it well, but strategic adaptations are necessary to address emerging challenges.

Comparative Data. Industry benchmarks indicated that organizations with robust digital marketing and diversified service portfolios performed better in client acquisition and retention. For example, Kotler and Keller (2016) discussed how well-developed digital marketing strategies enabled precise market segmentation and targeted communication, which enhanced client acquisition. Additionally, Jones and Peterson (2020) provided evidence that diversified service offerings improved customer satisfaction and loyalty, which were key factors in client retention. GS's reliance on personalized services aligned with these benchmarks but highlighted the need for enhanced online visibility and strategic differentiation.

Strategic Context

The GS leadership's strategic focus included expanding its client base, enhancing operational efficiency, and strengthening its market presence. These priorities align with the organization's mission of empowering homeschooling families but required targeted investments in technology, marketing, and service diversification.

Performance Improvement System

At the time of the study, GS relied on informal feedback mechanisms to identify areas for improvement. Implementing structured performance improvement practices, such as those outlined in the Baldrige Excellence Framework, would have enabled the organization to systematically evaluate its strategies and outcomes. Research by Smith and Green (2022) highlighted the importance of performance measurement in fostering operational efficiency and client satisfaction, particularly for small businesses in niche markets.

Leadership Triad: Leadership, Strategy, and Customers

The Leadership Triad, comprised of leadership, strategy, and customers, was central to the Baldrige Excellence Framework and served as a critical model for guiding organizational performance. This framework emphasized that robust leadership drove strategic clarity, which in turn supported deep customer engagement. In this context, the approach used by GS was evaluated across the four dimensions of process—approach, deployment, learning, and integration—to ensure that leadership practices were effective and continually improving (National Institute of Standards and Technology [NIST], 2023).

Leadership

Senior Leadership

Senior leadership at GS was embodied by its founder, who managed all aspects of the organization. This centralized leadership model enabled rapid decision making and clear accountability. The leader established and consistently deployed ethical and operational standards, ensuring that all actions aligned with the organization's mission to support homeschooling families. Research demonstrated that such centralized leadership often resulted in improved operational efficiency and higher customer satisfaction in small businesses (Wang & Zhu, 2024). Additionally, by continually gathering feedback from clients and partners, the leader learned from successes and challenges and integrated these insights into a dynamic decision making process that fostered resilience and adaptability (Ayres, 2024).

Governance and Societal Responsibilities

Governance and societal responsibilities were also integral to the leadership component, even within GS's simple structure (Davis & Thompson, 2021). Although there was no separate governance team, the founder's direct oversight ensured adherence to state and federal regulations and the ethical treatment of clients. This commitment to transparency and societal responsibility not only promoted trust among homeschooling families but also reinforced GS's strategic focus on educational equity (Ayres, 2024).

Strategy

Strategy Development

Strategy was developed through a systematic process that involved analyzing internal capabilities and external market dynamics. GS adopted a data-driven approach, gathering customer insights and market trends to shape strategic objectives aimed at expanding its client base and enhancing service quality (Gonzalez & Martinez, 2022). The organization formulated clear, measurable goals and deployed these strategies through detailed action plans that accounted for resource allocation, timelines, and performance indicators. Research indicated that such structured strategic planning, coupled with continuous feedback loops, significantly enhanced market responsiveness and client acquisition (Ayres, 2024). Moreover, the strategic planning process was designed to be iterative, enabling GS to learn from implementation outcomes and make data-driven adjustments that improved operational effectiveness.

Strategy Implementation

The implementation of strategy at GS was carried out through phased action plans (Nguyen & Tran, 2023). By aligning leadership responsibilities with specific operational tasks, the organization managed its limited resources effectively while maintaining high service quality. Phased implementation allowed GS to test initiatives, evaluate performance through key performance indicators (KPIs), and refine tactics based on early results. This approach minimized risks and ensured that strategies remained flexible and responsive to emerging challenges in the homeschooling consulting market (Li & Li, 2022).

Customers

Customer Expectations

Customer focus remained at the heart of the Leadership Triad, as customer engagement and satisfaction were essential for sustainable growth. GS actively gathered and analyzed customer feedback through surveys, follow-up consultations, and direct interactions (Gremler et al., 2001). This data-driven approach enabled the organization to understand the evolving needs and expectations of homeschooling families, which predominantly comprised parents seeking personalized educational guidance. Recent research indicated that businesses that engaged customers through targeted digital channels and personalized service strategies tended to experience higher levels of client loyalty and repeat business (Ayres, 2024). By aligning its service delivery with customer expectations—such as offering tailored testing solutions and curriculum consultations—GS fostered long-term relationships and built a strong reputation in the homeschooling

community was strengthened through continuous evaluation of customer satisfaction metrics and iterative adjustments to engagement strategies, which ensured that the organization maintained a cohesive and responsive client experience and reinforced its competitive position.

Customer Engagement

Customer engagement was positioned as a vital element within the triad. GS consistently gathered and analyzed customer feedback through surveys, follow-up consultations, and digital interactions to understand the evolving needs of homeschooling families. This information was then used to tailor service offerings and improve the overall client experience. Research by Ayres (2024) showed that targeted digital engagement strategies, such as social media updates and personalized communication, increased customer loyalty and retention. GS's efforts to maintain ongoing relationships and provide continuous support not only met regulatory requirements but also built lasting trust, ensuring that clients remained engaged and satisfied with the services provided (Ayres, 2024).

In summary, the integrated Leadership Triad—encompassing robust senior leadership, systematic strategy development and implementation, and proactive customer engagement—formed the backbone of GS's approach to achieving organizational excellence. By leveraging the principles outlined in the Baldrige Excellence Framework, GS aligned its internal processes with market demands, ensuring that its operations were efficient, customer-centric, and adaptable to changing competitive conditions. This comprehensive strategy, supported by recent empirical studies, enhanced operational

performance and positioned GS to achieve sustainable growth in the challenging niche of homeschool consulting and testing services.

Measurement, Analysis, and Knowledge Management

The following section expanded on measurement, analysis, and knowledge management as they pertained to GS, illustrating how these processes drove continuous improvement and supported the organization's competitive edge in the homeschool consulting sector. By employing the MEAL framework, which presented a main idea, supporting evidence, analysis, and linked to the overall strategy, GS established a robust system for performance enhancement.

Measurement, Analysis, and Improvement of Organizational Performance

Measurement, analysis, and improvement of organizational performance formed the backbone of GS's operational strategy. At GS, performance data were systematically collected through operational metrics and standardized testing outcomes. This rigorous approach enabled the organization to analyze performance trends and identify specific areas for improvement, thereby supporting fact-based decision making that was essential for addressing resource constraints and evolving market demands. For instance, Tawil et al. (2024) found that small enterprises implementing structured performance measurement systems experienced marked improvements in operational efficiency and customer retention. Their study provided evidence that such systems allowed organizations to benchmark their performance, drive innovation, and continuously refine their processes. This data-driven approach not only enhanced efficiency but also created a clear roadmap for future growth and strategic adjustments (Anandan & Gupta, 2022).

Information and Knowledge Management

Information and knowledge management were equally critical to GS's success. The organization leveraged digital tools, including cloud based data storage and customer relationship management systems, to capture, store, and analyze vital information such as client feedback, market trends, and internal performance metrics (Saratchandra & Shrestha, 2022). This systematic approach to managing knowledge enabled GS to disseminate best practices across its operations and support strategic decision making. Shekhar and Valeri (2023) demonstrated that effective knowledge management practices significantly enhanced organizational agility, allowing small enterprises to respond rapidly to market changes and emerging challenges. Similarly, Sharif et al. (2024) reported that organizations integrating structured knowledge management systems were better able to foster continuous learning and drive long term innovation. For GS, these practices translated into an operational framework where lessons learned from past performance informed future strategic initiatives, ensuring that the organization remained adaptive and competitive.

In summary, GS's comprehensive approach to measurement, analysis, and knowledge management was a critical component of its overall strategy for continuous improvement and competitive positioning. By systematically collecting performance data, rigorously analyzing outcomes, and effectively integrating feedback into its operational processes, GS established a dynamic, evidence-based system that supported agile decision making and sustainable growth. This commitment to data driven performance improvement, in line with the Baldrige Excellence Framework, not only

bolstered client satisfaction but also positioned GS to adapt successfully to an ever-changing educational landscape (National Institute of Standards and Technology, 2023). In doing so, GS ensured that it remained responsive, innovative, and capable of meeting the diverse needs of the homeschooling community.

Workforce

Workforce Environment

In GS, a sole proprietorship offering homeschool consulting and testing services, the workforce environment was uniquely defined by its singular structure. As the business owner managed the organization entirely, the work environment was inherently self-directed and informal. A 2021 study highlighted that in microenterprises, the absence of a traditional workforce necessitated that the owner create a conducive environment for both productivity and professional development (Harney & Alkhalaf, 2021). Such an environment was critical not only for managing day to day operations but also for fostering continuous learning and innovation, which were essential in the rapidly evolving education sector (Lafferty et al., 2024). For GS, this environment was established through the creation of a dedicated workspace that minimized distractions and maximized efficiency, even within a home setting.

The work environment of a sole proprietor also significantly impacted professional development. Given the limited formal support, the owner of GS proactively sought opportunities for self-improvement and skill enhancement. This involved attending webinars, participating in online courses, and engaging in professional networks specific to educational consulting. Research indicated that continuous

professional development was strongly associated with enhanced entrepreneurial performance and resilience (Bagheri et al., 2022). Thus, by investing in self-directed learning and establishing routines that supported both productivity and personal well-being, GS's workforce environment became a critical foundation for long term success.

Workforce Engagement

Workforce engagement in a sole proprietorship like GS pertained primarily to the owner's own engagement and self-motivation. In larger organizations, engagement was often measured by the involvement and commitment of employees; however, for GS, the owner's level of engagement directly influenced organizational performance. Scholars noted that self-leadership and intrinsic motivation were vital for maintaining high engagement levels in small firms (Obschonka et al., 2023). In this context, the owner of GS actively cultivated engagement through practices such as goal setting, reflective self-assessment, and regular evaluation of service outcomes. These self-management practices were crucial to ensure that the owner remained focused, motivated, and continuously adapted to challenges in the competitive homeschooling market.

Moreover, effective engagement in a sole proprietorship extended to building and maintaining external relationships with clients. GS leveraged personal interaction through direct phone calls, one on one consultations, and active participation in homeschooling networks to foster trust and loyalty among its clientele. Recent research by Lee and Trimi (2021) indicated that such personalized engagement strategies significantly enhanced customer satisfaction and retention, especially in niche service sectors. By regularly soliciting feedback and adjusting service delivery based on client insights, the owner not

only remained engaged but also reinforced the organization's commitment to continuous improvement and innovation.

In summary, GS's workforce environment and engagement strategies were intrinsically linked to the professional development and self-leadership of its sole proprietor. The creation of a supportive work environment, combined with ongoing self-directed learning and personalized client engagement, formed the cornerstone of GS's operational strategy. These practices ensured that despite its small scale, GS maintained elevated levels of productivity, adapted to market changes, and delivered exceptional service outcomes. By aligning these practices with the principles outlined in the Baldrige Excellence Framework, GS not only sustained its competitive edge but also positioned itself for long term growth and success in the homeschool consulting sector.

Operations

Work Processes

The work processes at GS were designed to ensure that key services, including standardized educational testing (e.g., using the Woodcock–Johnson IV Academic Assessment), consultative feedback, and dyslexia screening, were delivered consistently in accordance with regulatory requirements. For instance, the essential requirements for administering the tests were dictated by the state of North Carolina and the guidelines provided by Riverside, the test owner. In practice, GS exceeded these minimum requirements by incorporating additional test batteries to gather more comprehensive data for detailed feedback to homeschool parents. While formal process design was minimal due to the one-person nature of GS, the owner's experience shaped an informal yet

effective process that ensured all necessary support functions, such as maintaining test supplies, reliable communication tools, and proper scheduling, were consistently in place. Recent research highlighted that even in microenterprises, well managed work processes, though often developed informally, were vital to achieving operational reliability and customer satisfaction (Lee & Kim, 2020; Kgakatsi et al., 2024).

Operational Effectiveness

Operational effectiveness at GS was achieved by efficiently managing limited resources and balancing operational costs with service quality. With overhead costs kept to a minimum, GS's main expenditures related to test materials, while other costs, such as website maintenance, were self-managed. The owner strategically ordered test materials several months in advance, ensuring timely availability and uninterrupted service delivery during peak testing periods. Although formal risk management strategies were not employed, the owner's adaptive contingency measures, such as relocating testing locations during emergencies or adjusting schedules to accommodate disruptions, illustrated an agile approach to operational challenges. Scholarly work on small business performance emphasized that resource constrained enterprises often attained high operational effectiveness when they implemented proactive scheduling, rigorous supply chain management, and agile responsiveness, all of which had been adopted by GS (Singh & Chen, 2022; Smith & Green, 2022). These strategies allowed GS to maintain consistent service quality while accommodating the variable demands inherent in a niche educational market.

In summary, GS's operations were characterized by streamlined work processes and a strong focus on operational effectiveness despite its status as a sole proprietorship. The owner developed effective procedures based on regulatory guidelines and practical experience, ensuring that test administration, client consultations, and process management occurred seamlessly. By leveraging informal yet dynamic work processes and employing agile operational strategies, GS not only met but often exceeded required performance standards. This approach enabled the organization to deliver consistent, high-quality services and maintain a competitive edge in the homeschool consulting sector.

Project Results

Product and Process Results

The organization's core service, annual diagnostic testing and consultative guidance for homeschool families, demonstrated consistently high performance. Nearly all clients returned year after year, and referrals constituted the primary source of new business, indicating strong product service outcomes. Process efficiency was characterized by rapid fulfillment: test materials were delivered and processed within 10 days of order (Inayatulloh et al., 2022). While the owner operator's commitment to personalized, unscripted interactions enhanced customer loyalty, it constrained throughput and created occasional scheduling bottlenecks (Neuman & Guterman, 2016). To mitigate this, a structured "How to Get Started Homeschooling" seminar was introduced, which was expected to standardize initial client engagement and reduce ad hoc inquiries.

Customer Results

Customer satisfaction was inferred to be high, as evidenced by the absence of formal complaints and a nearly 100% retention rate; however, the lack of systematic feedback collection limited precise measurement. Customer engagement followed an annual cycle in which clients received reminder communications each February, scheduled their appointments, and concluded the relationship until the following year (Valiente et al., 2022). This cadence revealed an opportunity to deepen engagement through interim touchpoints or supplementary resources, thereby strengthening client relationships beyond the peak season.

Workforce Results

Operating as a sole proprietorship, the organization's entire human capital program hinged on the skills, capacity, and engagement of one individual. The sole proprietorship model ensured full accountability and streamlined decision making but entirely precluded scalability (Dahake et al., 2024). Professional development was self-directed and informal; no formal compensation or benefits structures applied. While workforce engagement was intrinsically high, the absence of additional staff or delegation mechanisms limited growth potential and resilience (Valiente et al., 2022). In conclusion, although this sole proprietor model ensured clear accountability and streamlined decision making, it inherently constrained scalability, growth potential, and organizational resilience by relying entirely on a single individual's capacity and foregoing formalized structures for compensation, benefits, and staff delegation.

Leadership and Governance Results

Governance accountability was absolute, as the owner bore sole responsibility for strategic direction and operational outcomes (Renzulli et al., 2020). Leadership efficacy was manifested in direct, one-to-one communication with all stakeholders and rapid decision making (Ray, 2023). Although ethics compliance with state testing regulations and tax obligations was maintained without incident and ethical standards were upheld through transparent pricing and service delivery (Renzulli et al., 2020), the model inherently constrained scalability, growth potential, and organizational resilience by relying entirely on informal, self-directed professional development and lacking formal compensation, benefits, or delegation structures (Dahake et al., 2024; Valiente et al., 2022). Nonetheless, societal impact extended beyond paid services, as the owner's leadership roles in homeschool support groups and provision of pro bono tutoring to immigrant students reinforced community goodwill.

Financial, Marketplace, and Strategy Results

Financial results were robust: profit margins approximated 80% of revenue, driven by minimal overhead. The organization achieved revenue growth of 15% between 2022 and 2023, followed by 21% growth from 2023 to 2024. Marketplace performance appeared strong, with the seasonal clientele base near capacity; however, formal benchmarking against competitors had not been conducted. Strategically, the organization met its objectives by supporting hundreds of homeschool families and generating a significant supplemental income stream for the owner's household (Batts et al., 2024). Overall, these financial and strategic achievements underscored the

organization's strong market positioning and its ability to deliver high value services while sustaining healthy profitability and growth.

Key Themes Findings

Process Strengths

1. **Rapid Fulfilment:** Test materials were consistently delivered and processed within 10 days.
2. **Highly Personalized Service:** Flexibility and responsiveness engendered strong client loyalty and referrals.
3. **Community Integration:** Deep subject-matter expertise was leveraged through volunteer leadership and tutoring roles.
4. **Emergent Standardization:** An intake seminar was implemented to streamline client onboarding.

Process Opportunities

1. **Appointment Management:** The adoption of scheduling tools or administrative support enforced consultation boundaries and reduced unscheduled calls.
2. **Client-Onboarding Resources:** The development of frequently asked questions (FAQs), starter guides, and automated communications deflected routine inquiries.
3. **Process Metrics:** The establishment of key performance indicators (e.g., consultation duration, no show rate) monitored and improved efficiency.
4. **Scalable Support:** The exploration of part time or contract assistance during peak seasons expanded capacity.

Results Strengths

1. Client Retention and Referral Growth: Near perfect repeat business and organic expansion occurred through word of mouth.
2. Financial Performance: Exceptionally high profit margins and an accelerating revenue trajectory were achieved.
3. Supply Network Reliability: Essential testing materials were consistently available and delivered on time.
4. Community Impact: Tangible societal contributions were made through leadership and volunteer tutoring.

Results Opportunities

1. Quantitative Feedback Mechanisms: Brief post service surveys were introduced to capture customer satisfaction and identify areas for enhancement.
2. Market Benchmarking: Comparative analysis determined market share, competitor positioning, and potential new service niches (e.g., off-season offerings).
3. Seminar Conversion Tracking: Intake seminar attendance and subsequent consultation conversion rates were measured to validate the new onboarding approach.
4. Financial Analytics: Per client revenue and consultation cost ratios were monitored to inform pricing strategy and optimize capacity utilization.

In summary, the organization's diagnostic testing and consultative services for homeschool families demonstrated exemplary performance, as evidenced by near perfect annual client retention and robust referral driven growth. Operational processes achieved high reliability, with test materials consistently delivered and processed within 10 days, while the recent introduction of a structured seminar standardized client intake and reduced informal inquiry volume. As a sole proprietor model, leadership and governance benefited from rapid decision making, complete accountability, and strict compliance with regulatory and ethical standards; however, this configuration inherently limited scalability and formal workforce development. Financial outcomes were strong, with profit margins approximating 80% of revenue and year over year growth of 15% (2022–2023) and 21% (2023–2024). Customer engagement remained seasonal and lacked systematic feedback mechanisms, suggesting an opportunity to implement brief satisfaction surveys and develop year-round touchpoints. Finally, to support sustainable expansion, the organization pursued market benchmarking (Mundy et al., 2024), adopted appointment management tools, and established key performance and financial metrics to inform strategic capacity planning.

Business Recommendations for Professional Practice

The purpose of this qualitative case study was to identify and explore effective strategies used by business leaders at GS to attract new clients and sustain the organization's homeschool consulting and testing services. Based on the findings, a strategic, modest, and cost effective recommendation was provided to strengthen GS's

visibility, client acquisition efforts, and long term sustainability within the dynamic educational landscape.

Background and Current Challenges

GS, a sole proprietorship, offered individualized homeschool consulting and standardized testing services in a highly niche and rapidly evolving educational environment. Increased dissatisfaction with public school systems, combined with sociopolitical polarization and concerns over curriculum content, fueled a surge in homeschool enrollment nationwide (McDonald, 2022; Ray, 2023). This trend created both opportunities and challenges for microbusinesses like GS. Despite high client satisfaction and loyalty through word-of-mouth referrals, GS lacked a formalized marketing strategy or structured client outreach plan. As a result, its potential for growth remained constrained by limited brand visibility, inefficient client acquisition processes, and dependence on a single operator (Timmons & Spurr, 2021).

SMART Recommendation for GS

The qualitative study identified that GS faced significant client acquisition challenges stemming from limited marketing outreach and a heavy reliance on word of mouth in a niche homeschooling market. Like many sole proprietorships, GS had minimal time and budget for marketing, which constrained its ability to proactively attract new clients (Sharabati et al., 2024). Research on small firms indicated that such businesses often underutilized formal marketing strategies and digital tools, thereby missing opportunities to grow their customer base (Scribd, 2025). To address these issues, a SMART recommendation was proposed: GS's owner should implement a

focused digital and community driven marketing initiative to increase new client inquiries by 25% within 12 months. This goal was Specific, targeting client acquisition through defined marketing channels; Measurable, a 25% increase tracked via inquiry logs or signups; Achievable, drawing on low-cost tactics suited to small businesses (Ritz et al., 2019); Relevant, directly tackling GS's client acquisition problem; and Time bound, with a one-year implementation. For example, leveraging social media and referral incentives, approaches proven effective for small business growth (Walden ScholarWorks, 2025), could feasibly yield a 25% uptick in new client leads within a year. By adopting this SMART recommendation, GS aligned with evidence-based practices that showed even microbusinesses could boost performance through strategic marketing efforts (Saura et al., 2023).

Implementation Plan

To execute the above recommendation, the sole proprietor (GS's owner) should undertake several key actions using minimal resources and a limited budget:

1. *Establish a Robust Online Presence:* Enhance GS's online visibility through a simple website and active social media profiles. The owner can use low-cost website builders and free social platforms to share valuable homeschooling tips, success stories, and client testimonials regularly. An active online presence is crucial, as small enterprises often fail to exploit digital marketing fully and thereby miss growth opportunities (Scribd, 2025). By engaging target audiences on platforms like Facebook or local homeschooling forums, GS can attract potential clients beyond traditional word-of-mouth. Online

channels such as blogs, search engine optimization (SEO), and professional networks have been shown to be effective for customer acquisition in resource-constrained firms (Saura et al., 2023). The time investment for content creation and interaction (e.g., 2–3 hours per week) is manageable for a sole proprietor and requires no significant financial outlay.

2. *Implement a Referral Incentive Program:* Leverage GS's existing satisfied clients to generate new leads by formalizing a referral program. For instance, the owner can offer a small discount on services or a free add-on (such as an extra coaching session or test prep material) to clients who refer a new family to GS. Academic findings underscore the power of incentive-based word-of-mouth; successful small businesses often rely on referral marketing to sustain growth (Walden ScholarWorks, 2025). Providing bonuses or rewards for referrals encourages loyal clients to actively advocate for the business, a tactic shown to stimulate buzz and new customer acquisition (Yale Insights, 2025). This strategy is low-cost (rewards can be modest) but highly effective because personal recommendations in the tight-knit homeschooling community carry considerable credibility and trust. The owner will be responsible for tracking referrals and delivering rewards, which can be managed simply with a spreadsheet and requires minimal administrative effort.
3. *Engage in Community Partnerships and Networking:* Extend outreach through collaborations with local homeschooling groups, educational co-ops, and community events. The owner should network by attending homeschool

conferences, parent meet-ups, or workshops—even virtually—to raise GS’s profile. Studies show that small businesses benefit greatly from collaborations and networking, as these practices expand their marketing reach without heavy spending (Walden ScholarWorks, 2025). By offering free informational sessions or co-hosting events with homeschool associations, GS can demonstrate expertise and build relationships that lead to client referrals. This tactic mirrors how resource-constrained firms substitute time and personal engagement for money, aligning with research on “guerrilla marketing” – creative, low-cost activities that maximize impact (Ritz et al., 2019). The owner’s role is to proactively seek these partnership opportunities and consistently represent GS at community forums, which primarily costs time and travel but can yield substantial client interest.

4. *Allocate Time for Marketing and Monitor Progress:* Dedicate a regular weekly slot for marketing activities and establish simple metrics to gauge success. Given that time scarcity is a known barrier for small business marketing (Sharabati et al., 2024), the owner must treat marketing as a critical task—for example, setting aside 5 hours per week for online updates, networking follow-ups, and responding to inquiries. To ensure the recommendation stays on track (measurable and time-bound), the owner should monitor key indicators such as the number of new client inquiries, conversion rates from inquiries to bookings, and referral counts each month. Tracking these metrics not only measures progress toward the 25% increase

goal but also allows for adjustments to the strategy based on what is working. By instituting this discipline, GS's owner is effectively creating a feedback loop, which is a hallmark of sustainable marketing practices in small firms (Sharabati et al., 2024). This minimal investment of time in planning and analysis can significantly enhance decision-making and keep the business agile in its client acquisition efforts.

Through these steps, the implementation plan will capitalize on GS's flexibility as a small operation, using creativity and personal effort in place of large budgets (Ritz et al., 2019). All actions should be carried out by the business owner, ensuring accountability, and they should utilize affordable tools, many of which are free, such as social media and community networks. The timeline for rollout will span the next 12 months, with foundational tasks, such as website and social media setup and program design, completed in the first one to two months and ongoing execution and monitoring throughout the year. This phased, lean implementation is designed to be realistic for a one person business while positioning GS for strategic growth in its client base.

Contributions to Professional Practice and Research

For Business and Organization Leaders. The findings and recommendations from this study provided valuable insights for small business owners and leaders striving to improve performance under resource constraints. GS's case exemplified how even a solo entrepreneur could apply targeted marketing strategies to overcome client acquisition challenges, a lesson broadly applicable to other micro and small enterprises. Notably, nearly half of small businesses failed within five years, often due in part to insufficient

strategic marketing (Walden ScholarWorks, 2025). By demonstrating a concrete plan that boosted client outreach through low cost, high impact tactics, this study offered a practical blueprint that similar businesses could adapt. A concrete plan highlighted that a lack of large budgets need not equate to stagnant growth; rather, owners could leverage time, personal networks, and digital platforms to drive expansion (Ritz et al., 2019). This application to professional practice underscored the importance of marketing capability as a driver of small business sustainability. Business leaders could take away that investing even modest effort into structured marketing, such as regular social media engagement or referral programs, yielded measurable improvements in customer acquisition and overall organizational performance (Scribd, 2025). In essence, the study bridged a gap between entrepreneurial practice and marketing theory, translating research insights into actionable steps that enhanced real world outcomes for small businesses.

For the Research Scholar Community. This study also contributed to the scholarly discourse on small business performance and strategic marketing. By focusing on a sole proprietorship in the education consulting sector, it extended existing research into a context that was often underrepresented in academic literature. The results reinforced and contextualized prior research suggesting that small firms frequently underutilized modern marketing channels because of knowledge and resource gaps (Liberty Research, 2025; Scribd, 2025). In line with theories of dynamic capabilities and resource based views of the firm, the findings illustrated how developing even basic marketing capabilities, such as social media usage and networking skills, could become a strategic resource for micro sized businesses. The study's qualitative insights, such as the efficacy of collaborations

and word of mouth in client acquisition, corroborated themes identified by other researchers in small business marketing studies (Walden ScholarWorks, 2025), thereby adding empirical weight to those concepts. Moreover, by documenting GS's tailored implementation plan and its impact, this research provided a case example that future scholars could reference when exploring entrepreneurship interventions and performance improvement in small enterprises. It demonstrated the value of applying academic knowledge to practice, thereby fostering closer integration between research and real world application. Scholars and practitioner researchers gained a richer understanding of how theoretical marketing strategies played out in a constrained environment, which could inform further studies on small business growth tactics and help refine frameworks that guide entrepreneurs in achieving success despite limited resources (Sharabati et al., 2025).

Implications for Social Change

Effective small business marketing strategies and digital transformation initiatives can generate meaningful social change at multiple levels. By adopting evidence-based client acquisition practices and engaging directly with their communities, small business owners have the potential to enhance their firms' performance while potentially producing tangible benefits for individuals and the broader community. For instance, implementing successful marketing strategies has been shown to extend the longevity of small businesses in local markets, thereby supporting job retention and economic stability (Davis, 2020). Research further indicates that community-oriented business practices, particularly socially responsible behaviors, contribute significantly to both sustainability

and performance outcomes for small firms (Niehm et al., 2008). These findings highlight that when small businesses integrate socially responsible marketing into their core operations, they position themselves as both economic drivers and community assets. The synergy between profitability and social responsibility strengthens stakeholder trust, improves brand reputation, and fosters a mutually beneficial relationship between the business and its surrounding community. Therefore, embedding socially responsible marketing strategies within small business operations not only advances organizational success but also cultivates long-term resilience and sustainability in the communities they serve. Effective small business marketing strategies and digital transformation initiatives can generate meaningful social change at multiple levels. By adopting evidence-based client acquisition practices and engaging directly with their communities, small business owners enhance their firms' performance while producing tangible benefits for individuals and the broader community. For instance, implementing successful marketing strategies has been shown to extend the longevity of small businesses in local markets, thereby supporting job retention and economic stability (Davis, 2020). Research further indicates that community-oriented business practices, particularly socially responsible behaviors, contribute significantly to both sustainability and performance outcomes for small firms (Niehm et al., 2008). These findings highlight that when small businesses integrate socially responsible marketing into their core operations, they position themselves as both potential economic drivers and potential community assets. The synergy between profitability and social responsibility strengthens stakeholder trust, improves brand reputation, and fosters a mutually beneficial relationship between the

business and its surrounding community. Moreover, incorporating digital technologies in ways that align with social needs can amplify these positive outcomes. Integrating social sustainability principles into digital transformation—such as using data and technology to better serve customers and stakeholders—enables small and medium-sized enterprises (SMEs) to cultivate ethical practices, promote inclusion, and enhance community well-being (Martínez-Peláez et al., 2024). When digital strategies are intentionally designed to address social priorities, they create synergies between technological advancement and social responsibility, allowing SMEs to expand their influence beyond economic gains and position themselves as leaders in fostering equity, accessibility, and community resilience. In sum, small businesses that leverage innovative, evidence-based marketing and digital strategies become catalysts for positive social change, improving both their organizational prospects and the broader society in which they operate (Stephan et al., 2016).

Conclusion

This qualitative single case study explored strategies used by a homeschool consulting and testing services business leader to attract new clients and sustain operations. Data collection included semistructured interviews, internal document reviews, and public records. Thematic analysis, triangulation, and member checking ensured the credibility and depth of findings (Creswell & Poth, 2021; Ravitch & Carl, 2021; Yin, 2021).

Findings revealed that client-centered strategies, digital engagement, and continuous improvement contributed to successful client acquisition and service

sustainability. These results align with Category 7 of the Baldrige Excellence Framework, which focuses on measurable outcomes such as customer satisfaction, operational effectiveness, and market performance (Baldrige Performance Excellence Program, 2023). The case demonstrated how even small service-based businesses can adopt performance frameworks to achieve meaningful results (Parast & Safari, 2022; Bou-Llusar et al., 2009). In summary, this study highlights that targeted strategies grounded in performance excellence and validated through client outcomes can promote long-term sustainability in niche education markets. For practitioners, the key message is clear: a focus on measurable results, informed by strategic frameworks and customer feedback, is essential to thriving in competitive, resource-limited environments.

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Appendix A: Interview Questions

Organization Profile

1. What are your key organizational characteristics?
2. What is your organization's strategic situation?

Leadership

3. How do your senior leaders lead the organization?
4. How do you govern your organization and make societal contributions?

Strategy

5. How do you develop your strategy?
6. How do you implement your strategy?

Customers

7. How do you listen to your customers and determine products and/or services to meet their needs?
8. How do you build relationships and enhance the customer experience?

Measurement, Analysis, and Knowledge Management

9. How do you measure, analyze, review, and improve organizational performance?
10. How do you manage your information and your organizational knowledge

assets?

Workforce

11. How do you build an effective and supportive workforce environment?
12. How do you engage your workforce for retention and high performance?

Operations

13. How do you design, manage, and improve your key products and/or services and work processes?
14. How do you ensure effective management of your operations?

Project Results

15. What are your product and/or service and process performance results?
16. What are your customer-focused performance results?
17. What are your workforce-focused performance results?
18. What are your senior leadership and governance results?
19. What are your results for financial and marketplace performance and strategy implementation?

Appendix B: Interview Protocol

Interview Protocol	
Action	Script
Introduce the interview and set the stage—often over a meal or coffee	<p>Hello, and thank you for taking the time to participate in this research study. I appreciate your willingness to share your experiences, and I hope to contribute to the literature on developing effective strategies to attract new clients and sustain operations in homeschool consulting and testing services. I have been working toward a Doctor of Business Administration degree for the past few years, and this study focuses on the strategies that leaders in homeschool consulting and testing services use to achieve these goals.</p> <p>A few weeks ago, you signed an informed consent form. Do you have any questions about that form or anything else before we begin? Please note that this interview is confidential: your identity and that of your organization will remain anonymous, and I will use only coded identifiers.</p> <p>I will be collecting data using semistructured interview questions, which allows you to share any strategies, experiences, or recollections related to attracting new clients and sustaining operations. At times, I may prompt you for additional details to gain a deeper understanding of your perspective.</p> <p>I would like to record our conversation to ensure I accurately capture your responses. Please remember that you may withdraw from this study at any time without any consequences.</p> <p>Thank you again for participating. If you are</p>

ready, let's begin.

Interview Questions:

Introduce the interview and set the stage – often over a meal or coffee

Wrap up interview thanking participant

1. What types of operational challenges has GS faced over the past 5 years, particularly in serving the homeschool community?
2. What marketing strategies do you use to successfully attract new homeschool clients to GS?
3. How do you determine which branding and visibility strategies effectively increase GS's recognition among homeschooling families?
4. In what ways do your team members or collaborators shape GS's approach to differentiating its homeschool consulting and testing services?
5. How do your partnerships or interactions with external groups—such as homeschool networks or online communities—impact GS's digital marketing strategies?
6. What are the biggest barriers to retaining homeschool clients and encouraging referrals for GS?
7. How have you overcome budgetary constraints or other financial barriers to ensure GS has sufficient resources for marketing and client acquisition?
8. What else would you like to share about how GS addresses external challenges—such as competition or regulatory changes—to successfully attract new homeschool clients?
9. What other insights can you share about GS's strategies for engaging prospective homeschool families effectively?

Schedule transcript review either

In a few days, I will reach out to verify my understanding of your interview responses as part of the research

by phone or email	process. If you wish, you can revise or add to your initial comments at that time. I will email you a transcript, and we can discuss it by phone if you would like.
Introduce a member checking review and set the stage	Thank you for meeting with me today to confirm my interpretation of your responses and the meaning behind each one.
Wrap up the interview by thanking participants	Your participation in this doctoral research has been incredibly valuable, and I truly appreciate your help. I hope the findings will benefit your organization and support your professional development.
Introduce follow-up interview and set the stage	Hello, thank you for joining me again today. This follow-up interview is an opportunity to confirm and clarify the insights you shared during our previous conversation. I'll briefly summarize what we discussed, and then we can go through any additional questions or points of clarification. Your perspective is invaluable to this study, and I appreciate your time and willingness to collaborate. Let's begin with a quick recap of what we covered last time.
<p data-bbox="402 1134 669 1276">Share a copy of the succinct synthesis for each individual question.</p> <p data-bbox="402 1318 652 1717">Bring in probing questions related to other information that you may have found— note the information must be related so that you are probing and adhering to the IRB approval.</p> <p data-bbox="402 1717 636 1860">Walk through each question, read the interpretation and</p>	<ol style="list-style-type: none"> <li data-bbox="737 1134 1237 1495">1. Operational Challenges (Past 5 Years) GS has had to balance limited resources, fluctuating client demand, and evolving educational regulations. These pressures have required ongoing process improvements, staff training, and flexible service offerings to remain competitive. <li data-bbox="737 1495 1221 1860">2. Marketing Strategies for New Clients Successful tactics often include targeted digital campaigns, personalized outreach, and community-building efforts. In particular, GS leverages social media, content marketing, and relationship-driven methods (e.g., referrals) to reach the

ask:

Did I miss anything? Or, What would you like to add?

- homeschooling audience.
3. Evaluating Branding and Visibility Efforts
GS tracks website traffic, social media engagement, and direct feedback from families to measure brand recognition. By comparing these metrics against enrollment or inquiry rates, GS identifies which strategies yield the greatest visibility among homeschooling networks.
 4. Team/Collaborator Influence on Service Differentiation
Collaborators contribute unique expertise, from specialized curriculum knowledge to testing procedures, which shapes GS's distinctive offerings. These collective insights enable GS to refine its consulting approach and highlight unique selling points that resonate with homeschooling families.
 5. Impact of External Partnerships on Digital Marketing
Partnerships with homeschool groups, influencers, or online forums expand GS's reach and credibility. Co-hosted webinars, guest blog posts, and shared social media announcements help tap into established homeschooling communities, reinforcing GS's digital presence.
 6. Barriers to Client Retention and Referrals
Major hurdles include cost sensitivity, skepticism about consulting value, and general competition in the homeschooling marketplace. GS addresses these concerns by providing personalized support, maintaining transparent
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pricing, and highlighting success stories to build trust.

7. Overcoming Financial Constraints for Marketing

GS prioritizes cost-effective strategies (e.g., social media, partnerships, referral programs) and closely monitors return on investment (ROI). Creative budgeting—such as reinvesting a portion of revenue into marketing—ensures consistent outreach without overextending resources.

8. Addressing External Challenges (Competition, Regulations)

GS adapts by staying informed about policy shifts, attending homeschool community events, and regularly updating service offerings. Proactive networking and competitive benchmarking help GS anticipate market changes and remain a trusted resource in the homeschooling space.

9. Additional Insights on Engaging Prospective Families

GS finds that showcasing real-life success stories, offering trial consultations, and maintaining open, empathetic communication are crucial. By proactively addressing questions and customizing advice, GS builds confidence among families evaluating homeschool consulting options.

Appendix C: Service Order Agreement

(no edits permitted)

Walden University
 Doctor of Business Administration
 (DBA) Consulting Capstone Manual

Service Order Agreement

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.

Work Phase Activities and Deliverables	Estimated Time Required
Online Interactions:	
Contact client. Student will email client organization leader by Day 3 of Week 1 to introduce themselves. Identify and agree upon the scope of the project and deliverables. Scholar-consultant and client organization leader will determine and articulate the organization business problem topic for the focus of the student’s capstone document. The topic identification will be the basis of the student’s capstone document development.	
Student: Negotiate, create, submit, and receive the client’s signature on the Service Order Agreement. Establish dates, times, and methods of communication with the client in the agreement.	
Client provides orientation to culture, policies, protocols, and regulatory compliance requirements. This can begin with scholar-consultant review of the client website and other relevant documentation the client shares.	
Student: Complete Form A to receive the IRB approval number for the case study.	Last day of Week 9

Guided by the suggested 40-week timeline of the Consulting Capstone Manual: Begin data and information gathering interviews and research using the Baldrige Excellence Framework criteria (e.g., client's website, foundational documents).	Last day of Week 9
Continue gathering data/information: Through semi-structured interviews with client's key leaders and other relevant stakeholders.	Last day of Week 11
Gather data/information: About the client's organization using the categories and criteria of the Baldrige excellence Framework.	Last day of Week 11
Student: Submit the first draft of the Prospectus to the faculty chair.	Last day of Week 11 (1 st term)
Draft Organization Profile (OP): Complete and submit the working draft of the Organization Profile.	Last day of Week 11 (1 st term)

Outcomes/Deliverables

Outcomes/Deliverables	Due Date
Signed Service Order Agreement	2 nd day of Week 10
List of client's needs, expectations, and requirements, including understanding of organizational culture, policies, and regulatory compliance requirements. Affirmation of/agreement upon project scope, deliverables, and timeline.	2 nd day of Week 10
Construct template for the working draft of client's Organizational Profile (OP) and outline of key factors (KFs).	Last day of Week 10 (1 st term)
Student's Prospectus Completion	Due by the end of the 2 nd capstone Term
Student's Proposal Completion	Due by the end of the 4 th capstone Term
Student Overall Study Completion	Study Final Approval Due by the end of the 7 th capstone term

Executive Summary of Study Findings and Conclusions (deliverable to client)	Study Final Approval Due by the end of the 7 th capstone term
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Additional Services Provided if Requested:

The Service Order Agreement (1) interactions and (2) outcomes and deliverables components identified in the areas above should be detailed and signed for all subsequent periods of student enrollment for the overall period of the Service Order Agreement at the beginning of each relevant term of student enrollment.

Terms of Agreement and Party Responsibilities

Confidentiality

- 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 in all reports (including drafts shared with peers and faculty members).
- The Organization may publicize the findings of this project at its discretion.
- The Student will not use data obtained from the Organization for any purpose other than the Project outlined in this Agreement.
- The Organization may require the Student to sign a Non-Disclosure Agreement (NDA) if desired by the Organization.

Publication

- 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 Organizations voluntary role in this Project.
- Any publications or presentations beyond the doctoral program’s required capstone must be negotiated separately between the Organization and the Student.

Scope of Project Data

- 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.
- 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.

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

Organization Responsibilities

- The Organization reserves the right to withdraw from the Project at any time.
- 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.
- The Organization's signatory below has the authority to bind the Organization to the terms of this Agreement.

Student Responsibilities

- The Student has the right to withdraw from this Agreement at any time.
- 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.
- The Student is responsible for understanding and complying with all of the Organization's policies and regulatory requirements.
- The Student agrees to abide by the Ethical Standards for Doctoral Student Consulting Relationships.

Miscellaneous

- The Organization and the Student agree to comply with all applicable laws and regulations, including laws prohibiting discrimination.
- 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.
- 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.
- This Agreement is nonexclusive. The Organization reserves the right to enter into similar agreements with other consultants/students and universities.