

2016

# Marketing Strategies Used by Franchise Small Businesses to Retain Customers

Hilda Jordan Arline  
*Walden University*

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# Walden University

College of Management and Technology

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Hilda Arline

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Walden University  
2016

Abstract

Marketing Strategies Used by Franchise Small Businesses to Retain Customers

by

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MBA, Strayer University, 2010

BS, Elizabeth City State University, 1995

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

August 2016

## Abstract

Franchised small businesses will not survive their first 5 years if they cannot implement marketing strategies that appeal to their customers. The purpose of this multiple case study was to explore the marketing strategies that successful franchise small business leaders used to retain customers. The population comprised 4 business leaders at franchise small businesses in North Carolina. Competitive advantage theory and blue ocean theory grounded this study. Data were collected using semistructured face-to-face interviews and review of company marketing materials. Data were thematically analyzed, and 6 themes emerged: personalization of customer service, market segmentation, innovative advertising, networking, brand identity, and loyalty programs. Market segmentation and innovative advertising are fundamental strategies for retaining customers within the target market, whereas personalization of customer service can help build positive relationships with customers. These findings could improve customer loyalty and customer satisfaction, which might increase the number of successful small businesses in the United States. The implications for positive social change include the potential for business leaders to develop effective marketing strategies to retain customers, which may benefit customers through an increase in job opportunities in the local business community.

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## Dedication

I dedicate my doctoral degree to my late mom Donnie Pencie (Sister) Nowell Jordan. The person who stuck by me, supported me, and whom I found comfort in knowing she was right there by my side. I will always love you, momma. I also dedicate my doctoral degree to Christopher Arline for his love and support throughout this challenging journey. Lastly, I dedicate this degree to Chardonnay Hurdle, Esther Jordan, LuAnn Riddick a formal supervisor and friend, Willie and Lartrice Brown, and my family. I would like to thank all of you for believing in me when sometimes I did not believe in myself.

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## Section 1: Foundation of the Study

Every organization's first goal is to meet the needs and wants of the customer (Aghadavood & Askari, 2014). Marketing is a vital tool many organizational leaders use in a competitive market for survival and success, as well as knowing the customer's needs (Garg, 2012). Successful marketing has a powerful social impact on the economy because it provides improved quality of life for individuals and a better world with a lot less stress (Garg, 2012). A lack of marketing strategies may limit the attraction and retention of loyal customers.

### **Background of the Problem**

Business leaders struggle with survival in a competitive market and risk failure if they are not able to meet their customers' needs. The marketing infrastructure changes such as globalization of business concepts, market-based systems instead of centralized command, and the inclusion of technology has influenced the real world of marketing (Wilkie & Moore, 2012). For instance, the power of mass marketing is flourishing with growth in the marketing system and is causing significant changes to the marketing infrastructure (Wilkie & Moore, 2012). However, technology innovation and environmental change are earning a role in the review of marketing through business practice, policy formulation, and strategic thinking (Baker, 2013). Garg (2012) stressed that changes in the organization may cause marketing to change strategically in its theory of marketing communication because every contact a brand attracts makes an impression and influence customer's buying behavior.

Anderson, Swaminathan, and Mehta (2013) suggested that customer satisfaction is an essential factor for companies to cultivate long-term relationships and sustain customer loyalty. Ata and Toker (2012) noted company leaders who increase customer satisfaction promote greater performance within the organization. Aghadavood and Askari (2014) stated customer loyalty defines the success or failure of an organization because loyal customers are reliable and the cost to maintain loyal customers is less than the cost to maintain new customers. Furthermore, maintaining and improving customer loyalty is a continuous process to eliminate customer dissatisfaction, which can destroy an organization's image and make it difficult for businesses to attract prospective customers (Aghadavood & Askari, 2014).

### **Problem Statement**

Small and medium size businesses encounter challenges in marketing products and services, whereas 84% of small business owners indicated unprofitable marketing actions contribute to business failure (Cant, 2012; Cant & Wiid, 2013). Many companies perceive the retention of the customer as central to their management and marketing decisions because a 5% customer retention rate can increase a firm's profits by 25-95% (Sharmeela-Banu, Gengswari, & Padmashantini, 2012). The general business problem was that some franchise small business leaders face marketing challenges to retain customers, which results in loss of revenue. The specific business problem was that some franchise small business leaders lack marketing strategies to retain customers.

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore the marketing strategies franchise small business leaders used to retain customers. The population group consisted of franchise small business leaders 18 years or older in North Carolina with 3 years of marketing strategy experience within the organization and use retention strategies on a regular basis to retain customers. The data obtained from this study may influence social change by enhancing the knowledge of franchise small business leaders advancing in the economy and making a difference in the lives and well-being of others. Business leaders may use the results to develop marketing strategies and advertisements to attract potential customers and retain loyal customers. The results of this study might make a difference in the life of consumers by providing them with knowledge on how franchise small businesses target different market segments, which will allow consumers to make better decisions regarding purchasing products or services.

### **Nature of the Study**

The research method of this study was qualitative. In qualitative research, a thorough description of the study requires context such as descriptive information about the research setting, study participants, observed transactions, and processes of the phenomenon (Polit & Beck, 2010). Therefore, qualitative was an appropriate research method for this study. The quantitative method could have been appropriate; however, quantitative methods examine issues and problems by using numerical and statistical data. According to Williams (2007), quantitative research uses numerical data to answer research questions about the phenomenon of interest. I focused on exploring participants'

perspective of a specific issue; therefore, the quantitative method was not appropriate for my study. A mixed method combines quantitative and qualitative research method in the same research inquiry to develop rich insights into various phenomena of interest not fully understood (Venkatesh, Brown, & Bala, 2013). The mixed method approach was inappropriate for this study because the focus is on the participants' view of a specific issue of the participants instead of numerical statistics.

The research design chosen to conduct this study was a multiple case study. The case study is appropriate because researchers use multiple sources of information to understand the holistic and significant uniqueness of real-life situations within the research site (Yin, 2014). The other research designs considered for this study was ethnography, phenomenological, narrative, and grounded theory. Ethnographic research analyzes cultural-sharing behaviors of individuals or groups, and phenomenology explores individual lived experiences with a particular phenomenon (Williams, 2007). Researchers select the qualitative phenomenological study to research lived experiences and gain knowledge pertaining to the phenomenon (Englander, 2012). Narrative research consisted of a story or reflection of the participant's experience with the phenomenon. A narrative is one or more individual's experience or account of the subject's experiences within a social context (Wahyuni, 2012).

### **Research Question**

The research question for this qualitative study was as follows: What marketing strategies do franchise small businesses leaders use for retaining customers?



### **Interview Questions**

Participants answered the following questions:

1. What strategies have you developed for marketing your services or products?
2. What are different aspects of your product or services do you consider when developing marketing strategies?
3. How have you improved your marketing strategies to differentiate your services or products?
4. What marketing strategies have you used for retaining customers?
5. How has the marketing strategies affected the retention of customers?
6. What are some marketing strategies you use to position and promote brand identity?
7. What are the marketing strategies would you implemented to ensure a competitive advantage in the local and global market?
8. What marketing strategies would you suggest that small business leaders use to retain customers?

### **Conceptual Framework**

The conceptual framework for this study consisted of the competitive advantage theory (Porter, 1985) and the blue ocean theory (Kim & Mauborgne, 2005). The competitive advantage theory consists of three generic strategies, which include cost leadership, differentiation strategy, and focus strategy (Porter, 2008). The key construct of the competitive advantage theory, also known as competitive advantage strategy, is an organization's competitive advantage grows out of the value the organization creates for

buyers and exceed the firm's cost of creating what buyers are willing to pay (Porter, 2008). The competitive advantage theory applied to this study because the holistic view of the theory allows franchise small business leaders to explore experiences regarding the development of marketing strategies to ensure the firm's attractiveness in the industry and ultimately creates profit.

Kim and Mauborgne (2005) simplified the business world by classifying businesses as either a participant in the red ocean or the blue ocean (Wubben, Düsseldorf, & Batterink, 2012). Kim and Mauborgne developed the blue ocean strategy focusing on businesses creating a competitive strategy in the global market (Yang, 2012). Wubben, Düsseldorf, and Batterink (2012) indicated that the concept of blue ocean strategy is for businesses to create untapped market space increasing growth and profit while making competition irrelevant by using the strategy value innovation. The holistic view of the blue ocean theory is organizations could gain the competitive advantage in the global market by developing marketing strategies focusing on innovation outside the red ocean (Chandrakala & Devaru, 2013). The blue ocean theory relates to the specific business problem of this study because franchise small business leaders might use marketing strategies to create their untapped market space to retain customers.

### **Operational Definitions**

*Blue Ocean.* Blue oceans are new markets or those industries without any defined competitors (Dehkordi, Rezvani, & Behravan, 2012).

*Brand equity.* A core concept of marketing focusing on the direct effects that influences the perceived quality, brand associations, and brand loyalty associated with the brand (Buil, Martínez, & de Chernatony, 2013).

*Competitive advantage.* Competitive advantage is the invisible component of the strategy, where a product or service differentiates itself through its qualities from the competitors' products or services (Popa, Dobrin, Popescu, & Draghici. 2011).

*Electronic relationships (e-relationships).* Electronic relationships are interaction with consumers through the new media, e-mail, websites, and mobile telephony (Gummesson, 2002).

*Red Ocean.* Red Ocean is the known area of a market; where all businesses exist and all the boundaries, limitations, and play laws are clear (Dehkordi et al., 2012).

*Relationship marketing.* Relationship marketing is the development of long-term relationships between organizations with customers and stakeholders (Gummesson, 2002).

*Servicescape environment.* Service encounters emphasizing the importance of good personal relationships with customers as the production, delivery, and consumption of services as simultaneous processes (Gummesson, 2002).

*Staff word-of-mouth.* Staff word-of-mouth is a communication channel that employers might use as a means to influence precommitment of prospective employees (Keeling, McGoldrick, & Sadhu, 2013).

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

This section includes assumptions, limitations, and delimitations. The assumptions provided valid information on the participants, such as a number of participants and the employment affiliation of the participants. The limitation provides in detail the sample size and population and any concerns that may arise in connection with the participants. The delimitation provides concern for any weakness that occurred in the study.

### **Assumptions**

There were three main assumptions that applied to this study. Assumptions are the researcher's views of the research nature that shape one's conception and implementation of the specific research methods throughout the study (Marshall & Rossman, 2016). The participants of the study included franchise small business leaders 18 years or older in North Carolina with 3 years of marketing strategy experience within the organization and use retention strategies on a regular basis to retain customers. I assumed participants would give honest and accurate responses to their perspective of a specific issue as participants. I assumed all five participants answered all questions honestly for understanding marketing strategies franchise small business leaders may use to retain customers.

### **Limitations**

Limitations are the researcher's claims about generalizability or conclusiveness that derive from the conceptual framework and research design (Marshall & Rossman, 2016). A limitation of the study was the sample size, which consisted of only franchise

small business leaders 18 years or older with 3 years of marketing strategy experience within the organization and use retention strategies on a regular basis to retain customers that represent the general population of franchise small business leaders in North Carolina. The limitation of selected participants may not reflect the perception of all small business leaders in the industry. In addition, the possibility existed that participants may not wish to disclose information regarding their successful marketing strategies. Therefore, gathered data might limit generalizations to the larger population.

### **Delimitations**

Delimitations defined the scope or boundaries of the study. Delimitations are the boundaries of the study that indicate the overall broadness of the study's transferability (Marshall & Rossman, 2016). The scope of this multiple case study reflected only the experiences of franchise small business leaders who use retention strategies on a regular basis to represent the general population of franchise small business leaders in North Carolina. The business organizations were franchise small businesses with approximately 10 to 25 employees.

### **Significance of the Study**

The significance of the study includes information on the contribution to business practice and implications for social change. The section for the contribution to business provides information on the contributions to the reduction of gaps in marketing strategies. Implications for social change provides information on how the study may positively affect or improve social change of human or social conditions.

### **Contribution to Business Practice**

The focus of this qualitative multiple case study was to address the concerns of marketing strategies franchise small business leaders use to retain customers. Business leaders may use the results to develop marketing strategies and advertisements for attracting new customers and retaining current customers. Small business leaders might use the results of this study to develop marketing strategies to provide direction for creating a competitive marketing plan, thus increasing market share.

This study contributes to a reduction of gaps within the field of marketing. Previous research (Hede & Kellett, 2011; Larsen, 2013; Metcalf, Hess, Danes, & Singh, 2012) emphasized the numerical data associated with the product brand, web-based tools, consumer satisfaction, and marketing communications. Previous quantitative literature (An, 2013; Azim & Azim, 2012) examined the numerical statistics of marketing challenges, marketing strategies, and cultural differences in advertising. Mixed-methods studies (Metcalf et al. 2012) focused strategically on consumers' experience using product packaging and their perceptions of brand preference and loyalty. However, few studies in previous research provide an in-depth understanding of participant's view of marketing strategies and information that influenced their decision to rely on specific marketing strategies they viewed as realistic. Small business owners need knowledge developing realistic strategies for increasing market share (Cronin-Gilmore, 2012).

### **Implications for Social Change**

The findings may contribute to a positive social change by improving small business leaders' overall quality of life, because increased income leads to better health

care, decreased criminal activity and incarceration, and decreased reliance on welfare. In addition, the participants and communities might establish programs to help potential customers make decisions when choosing small businesses' products or services. Social change may be by increasing the awareness of how franchise small business leaders target specific markets while educating consumers to make better decisions when purchasing products or services. The results of the study might contribute to social change by providing insight into the importance for improving the quality of marketing strategies to help reduce the number of small business failures. The reduction in small business failures may positively affect local communities by increasing job opportunities and decreasing United States unemployment rates, which mitigates the long-term financial effects on society.

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

The review of supporting literature consisted of research from the Walden University Online Library using the Academic Search Complete database, Business Source Premier database, ABI/Inform Complete database, ProQuest Central database, and ProQuest Dissertations and Thesis database, and Google Scholar. In addition, I reviewed published books for supplemental material. Keyword searches included: *customer retention, marketing, advertising, marketing strategies, advertising strategies, customer relationships, relationship marketing, consumer behavior, customer satisfaction, and customer loyalty*. The literature review included 132 peer-reviewed journal articles (i.e., 115 published from 2012 to 2016, 13 published from 1948 to 2011),

two seminal works published from 2012-2016, and two seminal works published from 2008 to 2010.

In this literature review, I provided an overview of the development of the marketing theory. The next section includes a discussion of marketing challenges business organizations may encounter in relation to the social and economic environment. A review of the marketing strategies and advertising strategies used by business organizations follows the identification of marketing challenges. The next section consists of a brief review of customer relationship marketing as a tool to retain customers and to create profitable, long-term relationships with customers. In addition, the literature review includes details about the concerns of customer relationship marketing strategies. I also addressed the literary gap regarding the effect of advertisement strategies on consumer's decision to purchase specific products or services.

### **Overview of Marketing Theory**

The purpose of this qualitative study was to explore the marketing strategies some franchise small business leaders use to retain customers. This study included an explanation of the role of Porter's competitive advantage theory and Kim and Mauborgne's blue ocean theory regarding advertising as a factor for customers' decision to remain loyal customers and purchase the small business' products or services. The theories of marketing expanded since the early contributions of Robert Bartels and Wroe Alderson, which addressed aggregate levels of marketing phenomena (Achrol & Kotler, 2012). Alderson and Cox (1948) stated that theory in marketing initiated with the establishment of the Parlin Memorial Lecture. According to Alderson and Cox (1948),



universities began to offer courses in marketing theory, because the interest in a marketing theory rose in several areas. The tremendous growth of business education programs fueled marketing academia at numerous universities and assisted with the rapid growth in the field of marketing decades ago (Wilkie & Moore, 2012). Therefore, researchers and educational institutions focused on developing a theory to use within marketing.

Alderson and Cox (1948) stated that the interest in a marketing theory consists of the following two principal parts: (a) the justified conviction that marketing students reaped from their efforts small harvests of significant generalizations and (b) the evident belief among some observers that marketing students' achievement in setting fundamental problems for themselves was insignificant. Alderson continued to develop a central marketing theory during the annual American Marketing Association conferences (Alderson & Cox, 1948). However, Alderson did not establish a true marketing theory that would apply to all disciplines of marketing before his demise in 1965. The general paradigmatic framework for the existence of marketing theory consists of two main literature streams: (a) the exchange concept and (b) the understanding of the market mechanisms (Catoiu & Tichindelean, 2012). The understanding of markets is through the economic behavior of consumers and the defining of the exchange concept is exchanges resulting from the individual history of the market actors (Catoiu & Tichindelean, 2012). The development of formal marketing helped with prominent growth of the business structure in a competitive market (Wilkie & Moore, 2012).

Several researchers developed theories relating to various marketing concepts based on Alderson's publication of his landmark book, *Dynamic marketing behavior: A functionalist theory of marketing* (1965). Marketing scholars synthesized the fundamental premises of marketing into general theories beyond the exchange of goods, services, and money to include any valuable resource (e.g., time, energy, feelings, places, ideas, symbols, or information). In addition, marketing theories extended to exchange with customers, employees, suppliers, the public, competitors, and all types of organizations (Achrol & Kotler, 2012). For example, Gummesson's (1994) relationship marketing theory, Kim and Mauborgne's (2005) blue ocean theory, Martineau's (1958) brand identity theory, Porter's (1985) competitive advantage theory, and Tajfel's (1974) social identity theory.

Marketing is a key function and aggregation of process in an organization and creates effective relationships with the customer through successful communication (Lo, 2012a). Some of the aspects of marketing include advocacy, promoting of products and services, and public relations (Brown & Albright, 2013). Achrol and Kotler (2012) asserted that the field of phenomenal marketing is shifting to three emerging fields of marketing including consumption experiences, marketing networks, and sustainable development. Although researchers developed theories relating to key marketing concepts, business organizations continue to experience marketing challenges to retain customers.

## **Marketing Challenges Faced by Business Organizations**

Small and medium size businesses hold a critical position in the creation of employment and provide the government with revenue from taxes created from marketing (Karanja et al., 2013). New small and medium size businesses are extremely significant to the economy because they create wage growth and account for 60-70% of job creation (Wiid, Cant, & Roux, 2016). Conway (2015) asserted small businesses may develop quicker in some industries than larger businesses. Furthermore, marketing managers and marketing experts experience numerous challenges when developing marketing strategies, and some companies react to marketing challenges more constructively than other businesses (Civic, 2013).

Some of the challenges experienced by management are adapting to changing, organization commitment, and organization restructure to accommodate customer relationship management (Ata & Toker, 2012). Small business leaders face challenges of resource scarcity when planning and strategizing for marketing (Bettiol, Di Maria, & Finotto, 2012). Consequently, small business marketing leaders encounter challenges with wrong pricing strategies, business location, and inadequate information that might cause low demand for products, which may lead to a decrease in customers if the implementations of strategies do not fit the needs of the targeted market (Cant & Wiid, 2013). According to Cant and Wiid (2013), small and medium sized businesses face challenges of marketing management, human resources, and financial matters.

**Hiring and retaining marketing business leaders.** Challenges marketing experts encounter in the development of marketing strategy include the need for the

hiring of people who specialize in different areas of marketing, tracking massive activity on organization and realization of constant generating of information for making marketing decisions (Civic, 2013). In addition to the need for extended skills in marketing and related areas, there appear to be issues between education and practice, which suggest education place an emphasis on marketing (Brown & Albright, 2013). Hsieh and Chen (2011) asserted employees are the human capital of an organization and organizations achieve a competitive advantage via business strategy and its internal processes, human resource strategy, and organizational effectiveness, which generates superior performance.

Baker (2013) found that there is few marketing staff among board members of major corporations, but there are accountants with support from human resource experts, scientist, engineer, technologist, or designers responsible for the creation and production of businesses products and services. Retailers are using staff word-of-mouth as a channel of communication to gain a better understanding of potential employees' interaction with present and former retail staff (Keeling et al., 2013). Therefore, employer branding is a vital management tool because it brings forth an image of being first-class for organizations making it easier for companies to attract top talent (Heilmann, Saarenketo, & Liikkanen, 2013). Baker (2013) noted that marketing has the potential to transform goals into achievements of social business, sustainability, environmental protection and improved human welfare.

**Sustainability.** The future of the marketing phenomena depends on changes that involve consumer experiences, marketing networks, and sustainable development (Catoiu

& Tichindelean, 2012). Sustainable marketing begins simultaneously with the product development cycle (Achrol & Kotler, 2012). Sustainability firmly knits with the background of traditional societies, which includes wealth, rising materialistic tendencies and technology, but with inadequate marketing efforts short-term profit is limited with the possibility of threats to the ecosystem (Mohamed, 2013). Although the fundamental process in marketing is consumption, marketing science should focus on creating a healthy consumption environment and protecting the consumer from overconsumption (Achrol & Kotler, 2012). Barkay (2012) stated one strategy for sustainability is the development of corporate social responsibility guidelines including the development of socially responsible managerial systems and adoption of firm-specific and industry-wide codes of conduct.

Some of the negative impacts of marketing include rapid consumption of limited natural resources, lack of restraints on the wants marketing encourages, and over-fulfillments of consumers' materialistic desires (Achrol & Kotler, 2012). Marketing practitioners face the challenge of a never-ending supply and a declining value in marketing due to global sustainability crisis because of misguided efforts (Baker, 2013). Sustainable or green marketing includes the elements of Porter's marketing mix consisting of product, price, promotion, and place (Yan & Yazdanifard, 2014). The two types of carrying capacity for sustainable marketing are market capacity and resource capacity, where market capacity concerns whether society's present consumption level is too high to permit the next generation to consume the same level of goods and services (Achrol & Kotler, 2012). The ecological consequences of a mass consumption are rapidly

depleting scarce resources, environmental degradation, dangerous pollutants, emissions, waste due to logistics and distribution, and waste products due to the consumption and post-consumption processes (Achrol & Kotler, 2012). The two business strategies for ecological sustainability are transitional and transformational strategies because some business leaders adopt transitional strategies before moving toward a transformational strategy (Borland & Lindgreen, 2013).

Arseculeratne and Yazdanifard (2014) indicated that green marketing has become an important entity for business leaders looking for ways and means of being receptive to environmental issues by ensuring marketing activities for businesses geared to be responsive to minimizing environmental hazards. Green Marketing has a worldwide interest due primarily to environmental concerns, climate change, water management problem, and deforestation, which most customers would rather buy products from environmentally responsible companies (Yan & Yazdanifard, 2014). Many company leaders promote green marketing to maintain their competitive edge because the green movement holds business organizations accountable to ensure company leaders conduct their activities to cause minimum harm to the environment (Yan & Yazdanifard, 2014). For example, Xerox introduced Revive 100% recycled paper in 2012 to introduce green marketing of photocopier paper (Yan & Yazdanifard, 2014). Mike Lloyd, a member of Kimberly-Clark global sustainability team, stated that Kimberly-Clark's 2015 sustainability objectives focus on the water footprint of the organization's manufacturing sites, waste management, and environmental compliance by creating a program called

Water for Life to provide 200 million gallons of water per year in water-stressed regions (see Mizera, 2013).

**Globalization and competitive advantage.** According to Chen and Green (2012), challenges business owners encounter include competitors globally, an aging consumer market, and less income from households affect brand equity. Globalization has deterritorialized the links between people, social, and cultural practices from their territories such as town, neighborhood, state, or country (Kale & De, 2013). To compete with leading brands and incorporate product differentiation, some retailers invest in premium store brands (Levy & Gendel-Guterman, 2012). Fadaei (2016) indicated that industries and businesses globally utilize the Internet as a center for online sales.

Globalization facts have revealed the hidden potential for the international hospitality industry impact on the economy (Bharwani & Butt, 2012). Hence, Canada is overwhelmed with challenges of decreased marketing budget that will hinder Canada's efforts to take advantage of a growing world tourism market (Jayawardena, Horsfield, Gellatly, Willie, & Sovani, 2013). Nevertheless, Canada will continuously experience disparities that will force the country out of the tourism marketplace due to decreased funding and the overshadowing of competitors (Jayawardena et al., 2013). Certainly, hospitality firms need to consider investing technology for efficiency as new technologies create opportunities for positive word of mouth recommendations and other positive experiences from consumers (Jauhari, 2012). The quest for identity in the process of deterritorialization is significant in consumer behavior because contemporary

consumption is an important vehicle with which to shape one's self-image and define one's identity (Kale & De, 2013).

In fact, a key business behavior of enterprises is marketing, and the basic function is to attract and retain consumers to stay competitive in conditions of globalization and intensive competition (Borisavljevic, 2013). One of the most important aspects in offering a product is product design creativity and attractiveness to attract potential buyers (Abdullah, Hamali, & Abdullah, 2015). For instance, Ed State, Nigeria continue to experience challenges due to the lack of improved sports marketing which has created inefficiency in sports management and an inability to attract sports sponsorship (Awoma & Boye, 2013).

Competition is steadily getting tougher and more global because competitors imitate products before and after launching of the product (Ersun & Karabulut, 2013). Shaqiri (2013) identified the following trends regarding global production strategy: (a) reduction of cost prices while increasing quality; and (b) allocation of production in sectors where the country has a comparative advantage while reducing production in other sectors. For example, some senior managers employ outsourcing, which is a strategy that has affected the world economy globally by increasing sales and production while removing costs from operations to maximize overall profits for the organization (Shaqiri, 2013). Ersun and Karabulut (2013) indicated that to sustain an organization's competitive positions, global enterprises should redesign their management and marketing strategies because of shorter stages in the product life cycle.



**Marketing mix and marketing research.** Marketing mix as a business tool is synonymous with price, product, promotion, and place (Islam, Yang, Hu, & Hsu, 2013). Aremu and Bamiduro (2012) noted that the marketing mix has a direct relationship with the performance of entrepreneurial businesses and managements of entrepreneurial businesses are encouraged to pursue with rigor the marketing mix elements so their business can obtain a sustainable competitive advantage. An (2013) indicated international marketers must achieve the skill of understanding the value of cultural uniqueness when targeting a specific market. Aremu and Bamiduro (2012) concluded the marketing mix is particularly important for entrepreneurial businesses in Nigeria due to the volatility and highly competitive nature of the marketing environment in Nigerian. Many advertisers target consumers based on demographics, relevant geographic markets, and consumer interests (McAfee, 2011). Consumers that are living in poverty and subjects of government agencies, non-government organizations, charitable trusts, and religious orders do not constitute a marketable segment (Achrol & Kotler, 2012).

**Marketing innovation.** Monolithic marketing challenges research included innovation, entrepreneurship, and sustainability (Wilson & Grant, 2013). In addition, Cheung (2014) indicated that challenges of complex monolithic services include a lack of standardization of complex services, no ability to handle the service complexity and less structured planning and provision, and no or only poorly documented service catalogs, resulting in suboptimal offerings. Nike and Apple were two new brands that joined established brands such as, Coca-Cola and McDonalds in the effort to verify the end of

history pertaining to open-minded consumer capitalism in American diversity during the 1980s (Wilson & Grant, 2013).

Popa, Dobrin, Popescu, and Draghici (2011) indicated that innovation is a source of competitive advantage because improving service value affects the very essence of the organization, and institutions must adapt to social changes, the needs of citizens and stakeholders. Innovation is a key element for growing competitiveness of global enterprises (Ersun & Karabulut, 2013). Business leaders need to dedicate more time and resources into innovation, as well as keep in alignment with economic globalization and stay competitive in a growing market place (Cambra-Fierro, Melero-Polo, & Vazquez-Carrasco, 2013). Business leaders have extended the 4P's of marketing to the 7Ps, which are product, price, promotion, place, packaging, positioning, and people (Ersun & Karabulut, 2013).

Contemporary business networks evolved in the following two phases: (a) the routinization of the production function and backward outsourcing and (b) the routinization and outsourcing of innovation (Achrol & Kotler, 2012). Organizations improve innovation processes by exposing technologies, responding to markets, and making sure customers are satisfied (Ersun & Karabulut, 2013). During 2007-2012, the business environment and technology continued to evolve network structures toward Phase 3, where technology moves as close to consumption as possible (Achrol & Kotler, 2012). Manurung and Barlian (2012) asserted that the changes made by small-medium size entrepreneurs included implementing radical innovation in both product differentiation and cost advantage, which has influenced sustainability and growth in

small-medium sized businesses in West Java, Indonesia. According to Coelho and Henseler (2012), product and service differentiation is a source that represents a competitive advantage and is gaining more recognition between scholars and practitioners. Moreover, smaller competitors have gained a large share of the contract manufacturing business in cell phones, PDAs, laptops and digital cameras such as Amazon's kindle and Apple's iPad that pose a threat to the existence of printed media (Achrol & Kotler, 2012).

### **Marketing Strategies of Business Organizations**

A business marketing behavior should be strategic based (Civic, 2013). The goal of marketing strategies for an organization is growth and strength for the business position competitively in the market place (Azim & Azim, 2012). According to Bettiol, Di Maria, and Finotto (2012), previous literature deems management and strategy crucial functions that gained attention played by marketing in building and sustaining a competitive market. Yenipazarli (2015) agreed company leaders must introduce business strategies and new products that appeal to and excite consumers to prosper and progress in the competitive marketplace. In addition, organizational leaders implement processes to address the shortcomings of the business performance and sustain their competitive advantage (Nadarajah & Latifah Syed, 2014).

Garg (2012) indicated marketing strategies have to be flexible with change because business leaders make changes to their organizations to stay competitive. For example, franchise small business leaders might develop new strategies based on Michael Porter's competitive advantage theory or Kim and Mauborgne's blue ocean theory.

Business leaders continue to use Porter's competitive advantage theory for developing marketing strategies. Competitive advantage illustrates a significant role in the public sector by eliminating inefficiencies and waste while improving public services (Popa et al., 2011). In addition, the blue ocean strategy focuses on increasing demand while challenging business managers to break out of the red ocean of bloody competition (Chandrakala & Devaru, 2013). One of the most valuable assets of competitive advantage is innovation because it is a process of continuous improvement and offers creative reengineering supported through investments, adding to the product or service elements that generate value (Popa et al., 2011).

**Competitive advantage theory.** The three generic strategies involve a different route to competitive advantage for industries, making the task of selecting and implementing not easy, but are valid routes industries must explore to achieve a competitive advantage (Porter, 2008). Popa et al. (2011) noted that the purpose of strategy is to create and maintain a strategic advantage, so the strategy of the organization focuses on creating new advantages that lead to increased customer satisfaction compared to that of competitors. According to Fearne, Marian, and Dent (2012), a sustainable value chain analysis should expand the analysis outside the supplier-customer boundary to adapt more perspectives, which incorporate shared value and look beyond the chain's internal stakeholders, with collaboration as a means to sustainable competitive advantage. For example, Monsur and Yoshi (2012) asserted that the global apparel value chain in manufacturing is overwhelmed with competition from the low cost of labor and Michael Porter's generic competitive strategy is a strategic management theory that advocates that

industrial up-gradation or value chain integration gains competitive advantages for the firms. Popa et al. (2011) asserted that business leaders can achieve a competitive advantage, which can corrode, be copied, or counteracted by the competitors, only if the business system creates superior value for buyers.

Popa et al. (2011) indicated maintaining competitive advantages for a long amount of time allows them to become strategic or sustainable competitive advantages, and competitive advantage in the public sector is important because it helps improve public services and helps eliminate inefficiencies and waste. Hsieh and Chen (2011) used Porter's typology to interpret business level strategy and Porter's generic strategy as the method of achieving a competitive advantage, which included the three generic strategies of cost leadership, differentiation, or focus. Michelini and Fiorentino (2012) concluded that corporations and society share a mutual dependence regarding following shared value principle for business decisions and social policies to be beneficial, and companies must integrate a social perspective into the core frameworks used to understand competition and develop business strategy. Monsur and Yoshi (2012) indicated a difficult issue to consider is determinants of competitive advantages in apparel businesses, and Michael Porter's generic competitive strategy, resource base view, and capability based view has to be selected based on the nature of apparel business, including apparel supply chain, apparel buyers and final consumers. Peters and Zelewski (2013) acknowledged that Michael Porter's competitive strategies, which is known as a strategic tool in the food industry, provides guidance on selecting generic competitive strategies and appropriate supporting activities inside the context of sustainable development. Peters and Zelewski

(2013) showed that companies in the food industry who follow the idea of sustainable development would often have problems successfully establishing the competitive strategy of cost leadership. Both competitive strategy and blue ocean strategy goal are to avoid strong competition, whereas red oceans strategy is bloody because of the environment of strong competition (Dehkordi et al., 2012).

**Blue ocean theory.** The whole market universe consists of two oceans: the red ocean and blue ocean (Kim and Mauborgne, 2005). Red ocean symbolizes existing known market space with defined boundaries and known competitors who try to outperform their rivals to gain increased existing market demand (Chandrakala & Devaru, 2013). In contrast, blue oceans are environments that offer businesses a high potential of lucrative and profitable return (Dehkordi et al., 2012). Blue ocean symbolizes unknown market space defined by opportunities for profitable growth, untapped market space and a chance for new demand creation (Chandrakala & Devaru, 2013).

Product development has seen an increased amount of unacceptable new product failure rates due to competitors who interfere with marketing strategy and force that weaken resources and reduce success (Pitta & Pitta, 2012). A business can return in a competitive market as a new model by using a blue ocean strategy to create a new environment (Dehkordi et al., 2012). Businesses such as Coco-Cola, Deloitte, Proctor & Gamble, and HP used the blue ocean strategy to tap into new markets (Wubben et al., 2012). Therefore, a new product development process incorporating a blue ocean strategy before the idea generation stage might assist with reducing the failure rates of products and creating breakthrough products (Pitta & Pitta, 2012).

Researchers in the field of strategic marketing have studied the blue ocean strategy (Yang, 2012). Parvinen, Aspara, Hietanen, and Kajalo (2011) argued that the literature on blue ocean strategy lack a scientific theoretical corpus because few studies addressed the blue ocean strategy for creating unconventional, unanticipated, and business models that create new ways of delivering value to the customer in the marketplace contrary to the competition. Parvinen et al. (2011) examined how business model transformation constituting of completely new approaches into value creation drives the profitability and growth of sales activities by attempting to open missing avenues for such approaches to blue ocean strategy. Wubben et al. (2012) assessed whether the statement *in any industry, no matter how competitive it is, a company can create a blue ocean of uncontested market space* was significant and true for the European fruits and vegetable industry. In Europe, only 15 large buyer groups dominate the fresh fruit and vegetable markets; therefore, the fresh fruit and vegetable industry needs new business and value propositions to innovate, grow and prosper (Wubben et al., 2012). Wubben et al.'s (2012) findings confirmed the blue ocean strategy framework enabled one to identify untapped market space. For example, the new buyers targeted for Youngfruit are children and teenagers. Another example is the hotel industry, which offers intangible products and services to its customers (Yang, 2012). The hotel industry needs crucial strategies that include people-oriented services and repeat business to expedite a hotel's establishment of a sustainable successful advantage in an uncontested marketplace; therefore, the blue ocean strategy may offer important advantages for the hotel industry's survival in the market place (Yang, 2012).

**Strategies for competitive advantage in the global environment.** New trends of marketing arose in the 1990s that were more competitive than ever included the Internet, experiential, community, real-time, and application-based smart mobile media (Wilson & Grant, 2013). The twenty-first century has been an era of increasing globalization, and the advances in technology, transportation, and communication resulted in the spread of business ideas, knowledge, and information (Terkan, 2014). Gummesson (2002) added that the Internet network infrastructure allows consumers to send and receive information. Aldhaheeri, Abdulrahman, and Bach (2013) indicated the Internet has provided a more convenient and less expensive way of the interaction of individuals with each other including consumers and businesses. In addition, the Internet has made the avenue of unbound communication for Internet users easily accessible for group environments to share in conversations that document negative or positive discussion that might affect a business sale of products or services (Aldhaheeri, Abdulrahman, & Bach, 2013).

Since the introduction of globalization and the Internet, business leaders must focus on developing strategies to positioning their brand outside the domestic market. Amazon.com is a successful global Internet-based business that has earned over 34 billion dollars in revenue from implementing the blue ocean strategy with the idea of selling books online (Chandrakala & Devaru, 2013). According to Chandrakala and Devaru (2013), Apple is another successful global business that used the blue ocean strategy. Sashi (2012) indicated that digital marketing and the advent of the Internet have led to organizational leaders building close relationships with customers and influencing



how many organizations market their business to a target group of customers. Marketers can avoid boundary stretching by using new media introduced to the marketplace such as YouTube and Facebook if the new media provides an outlet for distribution of content that does not comply with regulatory codes (Parsons & Schumacher, 2012). Therefore, the Internet emergence has allowed marketing to change from conventional media to online marketing due to the characteristics of low cost, flexibility, and interactivity (Jiang & Wei, 2012). Furthermore, information and communication technology changes the nature of the competitive environment externally, by serving as a prerequisite for the survival of the business (Junarsin, 2012). Anderson et al. (2013) determined the Internet could be worse than word-of-mouth because social media allows a customer to share negative experiences with thousands of people.

A company looking for growth opportunities can quickly gain a competitive advantage by entering markets that have market-driven firms and self-regulation; however, competitor oriented market-driven firms should enter markets with regulatory protection from Government (Parsons & Schumacher, 2012). Samuelsen and Olsen (2012) asserted managers interested in growing their organizations should include brand extensions and not brand alliances as a marketing strategy because brand extensions outperform brand alliances. To maintain the competitive advantage in the post-modern arena, companies should invest heavily in co-developing a positive brand identity from members of the online brand community (Wang, Butt, & Wei, 2011).

### **Promoting Brand Image**

The Brand Identity Theory derived from Pierre Martineau's (1958) research on promoting of the retail store image to consumers. According to Martineau (1958), the brand identity or image is the consumer's perception of the brand or store in his or her mind in relation to the brand's functional qualities and an aura of psychological attributes. Martineau stated that consumers view advertising for personal identification, where the brand image is acceptable and appealing to them individually. Businesses that market and advertise their brand with sharp characterization and appeal attract a distinctive customer group; however, organizations that market brands with dull personalities tend to become the alternative for customers (Martineau, 1958). To enhance the relationship quality, managers might use culturally and spiritually significant stories of the brands, because brand managers leading the direction of brand culture may produce negative results (Wang et al., 2011).

**Development of brand image.** Branding emerged as a differentiation strategy to create familiarity, image, trust, and awareness about manufacturers' products and services (Nguyen & Mutum, 2012). Elving, Westhoff, Meeusen, and Schoonderbeek (2013) indicated that an organizations' most important asset is its brand, and it is a primary connection to the development of products or corporate identities. According to Allender and Richards (2012), business owners promote brands that are stronger more often than brands that are weak. Bikram Jit and Kaur (2013) asserted the smartest managers could make the wrong decision when trying to select the correct branding strategy if they do not have a clear understanding of the matching characteristics of fast

moving consumer goods, services, and durables. The newest trend in retailing is the emergence of premium store brands, where many retailers prefer investing in store promotion versus brand advertising (Levy & Gendel-Guterman, 2012). Bikram Jit and Kaur (2013) stated previous research clearly suggests challenges that include conflict and confusion in distinguishing the categorization of branding strategies. Ahmed, Ting, and Johl (2015) agreed marketers encounter many challenges when creating a unifying construction to achieve success in promotional campaigns to make certain branding elements stay aligned. Marketers have begun to develop offline brand communities and online brand communities for fostering customer engagement and brand loyalty (Chang, Hsieh, & Tseng, 2013).

**Positioning of the brand.** Organizational leaders using a promotional campaign involving a consumer's touching story can transmit a signal that modifies consumer purchase behavior through direct and indirect marketing (Ahmed, Ting, & Johl, 2015). In India, many leading management institutions are using social media networks such as Facebook, Twitter, LinkedIn, and YouTube to connect with their various stakeholders (Chauhan & Pillai, 2013). Another type of competitive advantage is the one that results from successful brands that offer reliable guarantees and significantly increase sales volume (Popa et al., 2011). Some companies exploit loyalty by stretching the brand to other products, for example, Oral-B extends from toothbrush to toothpaste and Nike extends from athlete shoes to athlete apparel (Chang et al., 2013). For example, some sport managers that the sport team's ability to represent associated communities such as

countries, cities and universities strongly influence their brand communities (Heere et al., 2011).

**Brand recognition.** Managers should cultivate a strong brand identification to build solid consumer-brand relationships that allow customers to attain social need satisfaction (Chang et al., 2013). The effectiveness of a brand extension strategy depends on the consumers' perception of similarity among the family of brands that share a brand name; therefore, a reputable brand name is an important asset (Puligadda, Cronley, & Kardes, 2013). A significant player in building brand loyalty is brand communities, which are networks where customers who use specific brands can share their experience with others (Chang et al., 2013; Wang et al., 2011). Personalization in advertisement is at an advantage because each commercialized message is unique to fit each customer (Baek & Morimoto, 2012).

### **Overview of Advertising in Business Operations**

Henry Sampson's (1874) *A history of advertising from the earliest times* and Frank Presbrey's (1929) *The history and development of advertising* were the first historical articles written about advertising (Schwarzkopf, 2011). Schwarzkopf (2011) argued that bias among many advertising historians lead to the development of the Western world advertising termed modernity, which the new age advertising theorist expressed as consumerism and the consumer culture. In addition, scholars at North American business schools created a sub-version of the narrative of modernization, the paradigm of Americanization (Schwarzkopf, 2011). The introduction of advertising in scientific research began with Hopkins' (1923) *Scientific advertising*, where Hopkins

argued that the sole purpose of advertising is sales (Berriain, 2013). The second phase of advertising evaluation emerged in the 1930s; for example, Starch (1932) measures the recognition of print ads using two joint measures: (a) having seen the ad, and (b) having read the ad (Berriain, 2013).

According to Martineau (1958), advertising is a significant factor in character expression for businesses, where the retailers focus on the factual content of their advertising such as item, price, timelines, and quality. Advertising plays a crucial role in the competitive marketing world, because advertisements are informative and persuasive in nature, as well as targeted at promoting a new product (Terkan, 2014). During the 1950s to 1970s, additional evaluation measures include the persuasion analyses methods, models based on attitude changes, address the effectiveness of a campaign as a whole, econometric modeling to evaluate advertising, and neuromarketing (Berriain, 2013). Advertising is a multi-billion dollar activity that varies in form from simple institutional messages to complex positioning messages invoking images, perceptions, and attitudinal responses (Parsons & Schumacher, 2012). According to Calderwood and Wellington (2013), advertising is a strategy of marketing to promote products and services to a specific market so a business can gain profits. Advertisements affect consumers' attitudes and buying behaviors (Terkan, 2014). However, the customer focuses on physical appearance, general tone, style of the advertisement, and the wording of the advertisement (Martineau, 1958).

## **Advertising Strategies of Business Organizations**

Multinational companies are facing challenges with advertising standardization, which is a growing importance in global marketing and branding for international marketers (Jiang & Wei, 2012). Governments regulate the norms of decency and fairness of acceptable advertising in open societies with freedom of speech in the social order to creating boundaries for advertisers and the public (Parsons & Schumacher, 2012). Fastoso and Whitelock (2012) noted the four approaches to companies that can assist with implementing international advertising strategies depending on the benefits an organization is trying to achieve include clustering, pattern implementation, national campaign transference, and localization. Advertising regulations and effectiveness varies, where some advertisers find opportunities to stretch the boundaries or rules because many governments allow self-regulation and follow a partial tolerance regime (Parsons & Schumacher, 2012).

Advertising departments measure the effects of advertising on firm valuation by new account announcements, which provide significant information to investors (Balas & Kaya, 2012). To measure and evaluate the effect of advertising, management should consider how it affects individuals, as well as the success of meeting critical strategic objectives (Berlain, 2013). International marketing managers must ascertain the appropriate approach to target consumers in cross-national and cross-generational advertisements (Jimenez, Hadjimarcou, Barua, & Michie, 2013). Puligadda, Cronley, and Kardes (2013) asserted that advertisements that influence local versus global processing should have similar effects in a consumption context. Azim and Azim (2012) indicated

businesses in the United States should be mindful of advertising techniques because different signs have different connotations in different countries that may not be acceptable, and can be offensive. Chang and Bandyopadhyay (2014) found advertisements that are funny in some cultures might be offensive in other cultures. Jimenez, Hadjimarcou, Barua, and Michie (2013) examined how immigrant minorities perceive advertising appeals by focusing on the reactions of Mexican-American consumers to puffery, which is illegal in Mexico. Jimenez et al. found that Mexican consumers were more susceptible to puffery-laden claims than Americans were. Additionally, different cultures use different advertising creativity strategies to cater to their customers (An, 2013). Comparative ads in *Advertising Age* accounted for about 15% of all the media firm's ads, where comparative advertising communicate verbally and visually the competitive advantage of superior brands by using direct or indirect comparison (Williams & Page, 2013). Non-comparative advertising encourages a focus on low-effort general impressions, yet comparative advertising encourages a focus on high effort analytic details (Puligadda et al., 2013). Approximately 62% of consumers believe it is unacceptable for brands to criticize each other in their ads, 34% of consumers believe it is acceptable for advertisers to criticize each other, and some individuals' view comparative ads as culturally inappropriate (Williams & Page, 2013).

**Advertising mediums.** Organizational leaders use promotional campaign as a form of communication to obtain the maximum effectiveness from an optimal advertising investment (Ahmed, Ting, & Johl, 2015). For example, Calderwood and Wellington (2013) conducted a qualitative study to explore the experiences of gamblers and their

families to better understand the impact of advertising billboards to promote gambling service. The participant's responses were that the billboards stimulated their emotions such as guilt, shame, and fear that the advertisement was a fraud (Calderwood & Wellington, 2013). Chen, Liu, Fang, and Lin (2013) conducted an empirical analysis on the significant influence of word-of-mouth regarding 11 categories of medical and health care, restaurants, insurance, beauty and hairdressing, training and education, airlines, bottled water, shampoo, digital cameras, fashion, and movies. The results indicated that the degree of consumer attention to word-of-mouth varies by product categories (Chen, Liu, Fang, & Lin, 2013).

Davis, Sajtos, and Chaudhri (2011) indicated marketers are using brand-advertising communications as an important avenue to communicate, encounter services, and network information. Chang, Hsieh, and Tseng's (2013) findings revealed that group electronic word-of-mouth in online brand communities exerts differential effects on members with distinctive levels of brand community identification, where consumers under low brand identification lack particular preference to a brand. Fan and Miao (2012) concluded that males and females perceive electronic word-of-mouth credibility, purchasing decisions, and trust of online consumer reviews differently, and customers highly involved with a product accepted and used positive consumer reviews to make their decision to purchase products or services.

Advertising has several ways to signal private information strategically (Chen & Tan, 2012). Word of mouth is an important concept in the marketing activities conducted by various organizations because interpersonal communication is significant in



consumers' decision-making process (Lo, 2012b). Word-of-mouth, which is the process of exchanging information regarding a product or service through oral or written expression, is more reliable and persuasive than traditional media channels (Chen et al., 2013). The primary source of word-of-mouth communication is television, which accounts for 16% of the total media channels for sharing information (Lo, 2012b). Customer comments are a key entity of advertising because they provide vital product information, such as opinions, experiences, issues, or electronic word-of-mouth that can assist customers in decision making when purchasing a product (Fu & Chen, 2012). Customer's communication of positive word-of-mouth makes the firm more competitive and increases future profits (Lo, 2012a). In contrast, negative word-of-mouth communication is a problem for marketers, because negative word-of-mouth is more abundant than positive experiences because individuals share negative experiences more than their positive experiences (Lo, 2012b).

**Online advertising.** The global businesses have implemented online advertising as a major direct marketing channel (Jiang & Wei, 2012). Azeem and ul Haq (2012) suggested printed messages are more acceptable than messages via the Internet unless conveyed by a popular brand. Hendrix (2014) asserted digital marketing allows organizations to reach more prospective customers at a lower cost than traditional marketing. Furthermore, online advertising that include banners and buttons are on the web to promote sites to prospective customers (Azeem & ul Haq, 2012). For example, advertising on Facebook consists of paid-for banner advertisements, sponsored stories, and companies' ability to post and present content in a timeline format on their free brand

page (Beauchamp, 2013). However, Baek and Morimoto (2012) found customers normally avoid personalized advertisements via tools that eliminate online advertisements through techniques such as blocking, filtering, and do-not-track programs. Azeem and ul Haq (2012) agreed Internet user's responses to web advertisement banners are insufficiently low. According to Baek and Morimoto (2012), the development of information technology continues to advance allowing advertisers to take a more personalized advertising approach to tailoring messages to fit individuals instead of the traditional mass advertising approach. Cheung (2014) indicated that entrepreneurs restructure the production process by adopting new technologies such as digital marketing, which could increase profits and help maintain the sustainability of the organization to meet the consumer needs.

The three characteristics of Internet advertising exchanges that influence market design are fast delivery, low values, and automated systems (McAfee, 2011). Although many advertising teams perceive Facebook as a resourceful social media strategy, some corporation leaders changed their strategy because of the negative consumer perceptions of Facebook advertising (Beauchamp, 2013). Hede and Kellett (2011) stated that Web 2.0 tools for social networking such as Facebook, MySpace, and Twitter, seem particularly suitable for technologically oriented consumers. Barrutia and Echevarria (2013) agreed social marketers need partners that are experts in competencies in innovation and use marketing tools to achieve social practices.

The introduction of the Internet created a vast channel of information flows such as word-of-mouth and technical advice from user communities and websites, where most

areas of consumer interest have a dedicated chat group, blog, or interactive forum (Achrol & Kotler, 2012). Consumers use social network services as an unbiased tool for searching product and service information and for offering their consumer-related advice (Arenas-Gaitan, Rondan-Cataluña, & Ramirez-Correa, 2013). Sashi (2012) agreed the use of technology has become a part of most individual's daily life and can influence negatively or positively customer buying behaviors and customer relationships and loyalty for an organization. A firm's behavior and transparency are greater through the increasing use of social networking web sites, blogs, and fora, where consumers may write about their negative experiences and spread negative word-of-mouth (Nguyen & Mutum, 2012). Electronic word-of-mouth is available to customers in virtual communities such as consumer reviews, blogs, forums, and social networks (Fan & Miao, 2012). Fu and Chen (2012) suggested blogs are a strong advertising medium, which illustrates a major part in the buying behavior of a large variety of customers. Customers cannot touch products or meet electronic word-of-mouth senders in virtual communities to develop trust; therefore, consumers depend upon their expertise to determine the credibility of product information, reviews, and recommendations (Fan & Miao, 2012). Consequently, the advertisement of blogs allows customers to communicate with other customers about whether or not they were satisfied with a product, determines the customers buying behavior, and determines customer loyalty (Fu & Chen, 2012). Fu and Chen (2012) added that in 2000, blogs became another avenue in social media that allowed customers to voice their opinions and was an inexpensive advertisement tool for

thriving companies. However, electronic word-of-mouth affects consumer consumption decisions and brand attitudes (Chang et al., 2013).

Consumer communities are social networks that develop complex organic properties with informal structures, transient membership, and trust based organization (Achrol & Kotler, 2012). Aldhaheeri, Abdulrahman, and Bach (2013) asserted communication applications such as social media has increased in demand. More relationship-oriented and interactive forms of communication with consumers continue to replace advertising as a form of marketing communications (Schwarzkopf, 2011). For example, electronic-relationships emerged in new markets, new management modes, and new purchasing and consumption behavior (Gummesson, 2002). Lin (2012) stated that a long-term relationship between a business and the customers leads to the development of a trustworthy relationship.

### **Customer Relationship Marketing**

Relationship marketing focuses on establishing long-term relationships with customers and keeping them (Unhanandana & Wattanasupachoke, 2012). Firms that practice relationship marketing emphasize building longer-term relationships with their customers to emphasize customer loyalty (Trocchia, Finney, & Finney, 2013). Herhausen and Schögel (2013) defined customer relationship management capabilities as a firm's core organizational processes that focus on establishing, maintaining, and enhancing long-term associations with customers. Total relationship marketing includes relationships to a supplier's own suppliers, competitors, and intermediaries, as well as the following three nano-relationships: (a) internal marketing, (b) consequence of

deregulation, and (c) employees as internal customers (Gummesson, 2002). Stakeholders use relationship marketing to examine a firm in terms of profitability perspectives because relationship marketing attracts new investors for the firm (Lo, 2012a). The classic relationship-marketing model consists of firms developing enduring relationships with consumers by creating forums for consumer interaction, developing extensive databases on the consumers, and targeting customized communications to the target market (Achrol & Kotler, 2012). Gummesson (2002) asserted that the core values and beliefs associated with relationship marketing consist of each customer is an individual; collaboration and joint value-creation; long-term relationships pay; win-win; and service and relationship values versus bureaucratic-legal values. Catoiu and Tichindelean (2012) noted that the rise of the relationship-marketing paradigm took the forms of market fragmentation and the growing importance of services within the developed economies, where marketing professionals focused on creating profitable, long-term relationships with their clients. Relationship marketing benefits the firm, whereas relationship marketing for the customers results in pressures to provide personal information to firms (Trocchia et al., 2013).

Customer relationship management entails all characteristic of communication between corporation management and the clients or customers (Ruchi, 2014). Services marketing contributed to relationship marketing by stressing interaction between customers and suppliers and taking place in a *servicescape* environment (Gummesson, 2002). Unhanandana and Wattanasupachoke (2012) stressed marketing campaigns contributes to relationship building among employees and external partners. Additionally,

customers are a very important commodity and play a major role in the success of a business (Aghadavood & Askari, 2014). The adoption of new technology and the Internet have enabled customer relationship management to flourish, where the interactions between buyer and seller can now remain effortlessly stored in a customer relationship management database (Nguyen & Mutum, 2012). A well-designed customer-relationship management system includes the following characteristics: (a) a customer-oriented aspect, (b) sales force automation, (c) use of technology; and (d) opportunity management (Ruchi, 2014).

**Strategies for customer relationship marketing.** Tretyak and Sloev (2013) argued that every significant marketing action should not only increase the company's operating expenses, but also influence its market value. Traditionally the path to customer profitability was to change customer behavior without reducing customer-related costs, while increasing customer-related revenues and improve customer loyalty (Persson, 2013). Transactional marketing typically links the results of marketing activity with sales, market share, or some other firm-specific variable based on the assumption that the firm operates independently of its network (Tretyak & Sloev, 2013). Although customer acquisition might indicate a positive net short-term effect in terms of market share, there may be negative long-term effects because of the possibility of adverse effects on brand equity (Tsao, 2013). Tretyak and Sloey (2013) agreed that marketing activities with positive short-term effects could become negative later.

Although Alderson (1965) advocated collaboration as a necessity in a functioning market economy, the traditional view followed Porter's (1985) popular value chain

including marketing management and the 4Ps (product, price, promotion, place), which remain significant yet differ within the relationship marketing paradigm (Gummesson, 2002). The marketing paradigm has shifted from production efficiency aimed at lowering operational costs per produced unit to the idea of creating a relationship with customers (Nguyen & Mutum, 2012). According to Persson (2013), Grönroos (1992) classified customer-related costs into three types: (a) direct costs of maintaining a customer relationship, (b) indirect costs related to poor quality and subsequent service recovery, and (c) psychological costs caused by problems in a relationship. In the 1990s, companies began to improve on customer relationship management by giving back to their customers not only in terms of improved customer service, but also in incentives such as frequent flier programs and bonus points on credit cards for customer loyalty (Ruchi, 2014).

**Customer relationships and retention.** The essence of relationship marketing is the retention of existing customers by strengthening relationships and preserving their loyalty, as well as serving the customer as a client (Lo, 2012a). Recognizing and predicting the customer needs is an important strategy in the implementation of promoting organizational goals and may lead to increased customer loyalty, which encourages successful business (Aghadavood & Askari, 2014). Anderson et al. (2013) agreed that a business committed to its customer's wants and needs is receptive to learning how to resolve the issue quickly and satisfactorily. Cambra-Fierro, Melero-Polo, and Vazquez-Carrasco (2013) suggested business leaders gain a better interpretation of their customer needs and expectations, along with a plan for distribution and marketing

strategy to capture the customer's attention to generate profit and market capitalization. According to Aghadavood and Askari (2014), organizations' managers should enforce positive factors that relate to customer loyalty when developing marketing strategies and policies. Furthermore, customer loyalty increases profitability, organizations' market share from repeat purchases, and promote advertisement of the business and its brand via the customer to family and friends (Aghadavood & Askari, 2014).

Smart business leaders have an understanding that building lasting relationships with their customers is one of the greatest assets in the success of a business (Anderson, Swaminathan, & Mehta, 2013). Chen and Green (2012) indicated that business leaders experience challenges with retaining and attracting new customers and strengthening brand equity. Wiid, Cant, and Roux (2016) asserted the retention of customers and customer's satisfaction is imperative to maintaining a successful business and is a behavior that should be constant to gain continued customer loyalty. Unhanandana and Wattanasupachoke (2012) conducted a study on the customer relationship management aimed at gaining an understanding of the importance of customer relationship management and customer outcomes. Managers should build a continual relationship with customers since customer relationship management helps increase customer awareness and loyalty (Unhanandana & Wattanasupachoke, 2012).

### **Social Identity and Consumer Behavior**

Consumers might purchase a specific product based on the brand acceptance by a specific group and one's desire to be a part of that group. According to Tajfel (1982/2010), the social identity theory is the concept of relating self to a group using



categorization, identity, comparison, and psychological distinctiveness. Tajfel stated that psychological distinctiveness might enhance high status and insecure group identification or low status identity that leads to defenses, redefinition of groups or a new identity. Consumers might develop self-identity in brand communities at the group level within the community and the individual level with the brand (Chang et al., 2013). Social identification refers to the process of categorization used by a person to identify oneself or another person within a system of social categorizations (Tajfel, 1982/2010). Heere et al. (2011) agreed that a characteristic of the social identity theory is that individuals possess both a personal identity and a social identity encompassing salient group classifications. For example, group members might distinguish themselves from those who do not share affiliations through a categorization process (Chang et al., 2013). Self-identification is the individual's knowledge that he or she belongs to a social group, have some emotional and significant value as a group member, and have awareness of the existence of categories that generate the in-group or out-group response (Tajfel, 1982/2010).

**Consumer behavior.** Throughout history, the association of consumers with businesses was the possession of material objects (Wang et al., 2011). Achrol and Kotler (2012) stated that the nucleus of consumption is consumers' need and satisfaction, and consumers fulfill their need and satisfaction through human sensory processes. Therefore, the consumption experience is the fundamental domain of relevant theory and human sensory processes as the fundamental bases for using theoretical tools of consumer behavior analysis from cognitive concepts such as attitudes, information storage and

retrieval theories to the mechanisms of sensory depiction of reality (Achrol & Kotler, 2012). Consumers rely on extrinsic attributes such as likes, feelings, and emotions to form their preferences and evaluate product quality (Levy & Gendel-Guterman, 2012).

Arnould and Thompson's (2005) consumer culture theory addresses the relationships between consumer actions, the marketplace, and cultural meanings, as well as the socio-cultural, experiential, symbolic, and ideological aspects of consumption (as cited in Wang et al., 2011). However, one way to explain the formation of brand community identification is Tajfel and Turner's (1979) social identity theory with the core concept of the social identity theory is that people define their self-concept using their connections with social groups (Chang et al., 2013). Heere et al. (2011) definition of community identification is an individual's desire to belong to a particular community and adhere to the community's established norms and values.

Consumers have become more empowered because they can act as channels of distribution by posting a removed advertisement on sites like YouTube (Parsons & Schumacher, 2012). A consumer may declare himself or herself as a member of a social category, which contains social elements from culture, social networks, social groups, and society (Langner, Hennigs, & Wiedmann, 2013). In addition, an individual member of a specific social group will often take the social group's interest to heart, also in terms of buying behavior (Langner et al., 2013). Although, people use social network services based on the concept of social identity, social community members might not adopt the recommendations offered by group members (Arenas-Gaitan et al., 2013).

**Consumer buying behavior.** A signal of social identity is consumer-buying behavior; for example, individuals may purchase specific cars or dress in particular fashions to indicate their membership in a social group (Langner et al., 2013). Wang, Butt, and Wei (2011) agreed that consumers define social status based on brands they use. Identification with other communities might influence brand perceptions and one's decision to become part of a brand community (Heere et al., 2011). Consumers will use a brand and join the online brand community if they feel that self-image and a brand identity is congruent (Wang et al., 2011).

The retail store environment subject customers to different cues that might influence impulse buying, which is a customer's attraction to purchase promoted products because of sale promotions or advertising (Levy & Gendel-Guterman, 2012). Carrillat and d'Astous (2012) suggested consumers exposed to advertising understand the concept of the attempts of influence on consumers, more than consumers exposed to sponsorship attempts do. Davis et al. (2011) noted consumers are reluctant to try new mobile services or products in response to advertisings unless there is a relationship of trust. Consumers who appreciate new innovative products rely on advertising, perceive store brands as low-quality products and restrict their buying to national brands (Levy & Gendel-Guterman, 2012). Allender and Richards (2012) noted there are customers that are loyal to certain brands, but the customers will purchase other brands if the price is cheap enough. Consumers use brands that incorporate features of the individual's social identity, and brand name reputations to infer product value, quality, and reliability (Langner et al., 2013; Puligadda et al., 2013).

## **Previous Qualitative Research**

A review of the literature supports the use of the qualitative method, case study design, and interviews to conduct this study. The focus of this study is to explore marketing strategies used by franchise small business leaders for retaining customers. Researchers' perspective of qualitative research is the social construction of reality whereas they cannot analyze and understand a phenomenon by analysis of its parts; therefore, they must analyze the larger context in which people and knowledge function (Bernard, 2013).

Kaufmann, Loureiro, Basile, and Vrontis (2012) provided a contribution to advancing knowledge on the most recent phenomenon of the social brand community. Larsen (2013) conducted an exploratory qualitative research study on consumers' attitudes towards green electricity using a grounded theory approach to analyze the responses from 83 electricity consumers collected via focus groups. Metcalf, Hess, Danes, and Singh (2012) demonstrated how a web-based virtual ideation tool could capture insights from consumers and allow marketers to gain an understanding of consumer satisfaction with package design during and after product use. Bian and Moutinho (2011) investigated the impact of counterfeit branded products ownership on branded products and explored the determinants of counterfeit branded products purchase intention of both counterfeit branded products owners and counterfeit branded products non-owners. Hede and Kellett (2011) researched the gap in knowledge about marketing communications within the context of special events by analyzing managerial practice,

consumer perceptions, and preferences in relation to marketing communications for the market offering.

Kaufmann et al. (2012) study was an extensive interdisciplinary literature review in areas such as sociology, management, and marketing using a qualitative case study on Cypriot consumers that conducted in-depth-expert interviews and focus groups. Hede and Kellett (2011) used a case study analysis of Festival Melbourne 2006 using marketing communications collateral, ethnographic participant observations and in-depth and focus group interviews. In contrast, Metcalf et al. (2012) employed a mixed-methods approach to capturing the qualitative insights from a focus group regarding their experience using product packaging and a quantitative survey to capture brand familiarity and perceptions, as well as brand preference and loyalty. Additionally, Bian and Moutinho (2011) collected data using four-focus group discussions, a quantitative survey of 430 adults in Glasgow, UK measuring consumers' brand perceptions of counterfeit branded products and branded products, counterfeit branded products non-deceptive ownership, and counterfeit branded products purchase intention.

Hede and Kellett (2011) found that the marketing communications did not assist attendees to make the most of their event experiences, and research participants prefer to receive information about special events passively. Larsen (2013) identified several shared and country specific factors considered when promoting green electricity such as the identical nature of electricity, local production, skepticism, and corporate social responsibility. According to Hede and Kellett (2011), it is imperative to have an understanding of what information target markets are seeking, how they prefer to receive

it, and when they require this information for special events to be successful. Larsen's (2013) conclusion was that promoting green electricity requires an in-depth understanding of consumers' perceptions, and consumers perceive the concept green in quite different ways from traditional definitions.

According to Metcalf et al. (2012), the results demonstrated that package design is important to consumers, consumers are increasingly design literate, and the perceived quality of the package design does affect brand evaluation. Bian and Moutinho (2011) asserted that consumers have come to realize that a particular brand represents better quality, unique features, style, and excellent service; therefore, successful brand goods usually demand a higher price in the marketplace. However, negative reactions to product packaging adversely affected consumers' intent to purchase and recommend the product to others (Metcalf et al., 2012).

### **Gaps in Research**

My review of the literature consisted of information regarding marketing challenges faced by business organizations; however, the authors did not provide evidence of effective marketing strategies (Azim & Azim, 2012; An, 2013; Balas & Kaya, 2012). According to Balas and Kaya (2012), the measurement of advertising account change announcements and other new account announcements are strategies to help signal investors the valuation of firms. Azim and Azim (2012) conducted a quantitative study on the fast food restaurant McDonalds to analyze strategies for profitability, competition, and survival of the McDonalds Corporation. Balas and Kaya (2012) stated that new account announcements impact the share prices of multinational

corporations and account change announcements does not affect the wealth of the shareholder. An (2013) conducted a quantitative study on cultural differences in international advertising, which consisted of a survey of 255 college students from Korea and the United States. Although the findings indicated a better understanding among cultures and differences of advertising creativity, An (2013) recommended further research in advertising creativity strategies for different cultures for an in-depth understanding. Azim and Azim (2012) indicated that business leaders must stay abreast of environmental changes and make adjustments where needed to stay ahead of the competition. In addition, advertising techniques should meet the criteria of different cultures and societies other than the United States (Azim & Azim, 2012). Chang et al. (2013) suggested that future researchers should investigate how the effects of negative events and group electronic word-of-mouth influence online brand community response to other product categories.

Azim and Azim (2012) recommended further research on policies for customs, traditions, and religions for international countries due to different cultures and societies. An (2013) agreed that further research in advertising creativity strategies for different cultures would help different countries understand international marketing more in depth. Additionally, An (2013) noted further researches for factors that may influence advertising creativity include personal preference, brand loyalty, and traditional values. Calderwood and Wellington (2013) indicated the need for further research to promote advertising for stigmatized populations and exclude potential negative advertising of product and services. In addition, Calderwood and Wellington (2013) suggested the need

for further research for theory development on stigmatized populations to stay away from the negative contribution to social issues via advertising. Furthermore, Balas and Kaya (2012) acknowledged there is a gap in the literature on whether Multinational Corporation's value affects advertising and if investors acknowledge advertising as an important intangible asset.

According to Allender and Richards (2012), brand loyalty relationship with retail price strategies in marketing literature is still in need of more research to comprehend the relationship. Abubakar, Mokhtar, and Abdullateef (2013) also noted a gap in the literature for studies moderating the effect of relationship marketing dynamics of trust, personalization, customer satisfaction, and customer loyalty for the long-term orientation culture of bank customers. In addition, some research studies in the area of relationship marketing have made a significant connection of trust and personalization to customer satisfaction and customer loyalty (Abubakar, Mokhtar, & Abdullateef, 2013). Allender and Richards (2012) asserted promotion strategies have two key areas for purchasing decisions that include reduction in the original price and how often product promotion occurs. Foremost, promotion strategies are critically dependent on consumers because it indicates whether a reduction in price will entice the consumer to switch from a regular brand (Allender & Richards, 2012). Balas and Kaya (2012) suggested further research for challenges encountered by new account formation include the client negativity and the requirement of time to comprehend the customers' brand paid for by the customer.

This section of the literature review provided a summarization of the gaps in the research literature and the rationale for the research method and research design for this



study. The revealed themes indicated from the literature review include a consensus among researchers that gaps exist regarding the marketing strategies small business leaders use for retaining customers. The consensus among researchers that the qualitative research method would be most appropriate to address the phenomenon of what marketing strategies do small business leaders need for retaining customers (An, 2013; Balas & Kaya, 2012).

### **Transition**

The goal of the study was to explore what marketing strategies franchise small business leader's use to retain customers. Section 1 included the background, the problem, and purpose of this study. Section 1 ended with a review of the literature and a brief summary of the gaps in the literature.

Section 2 begins with an overview of this research study. I provide a discussion of participants, role of the researcher, population and sampling, and ethical measures. In Section 2, I also include details about the research method and design, data collection process, and data analysis process. I include the following components the presentation of findings, application to professional practice, implications for social change, and recommendations for action and future research in Section 3.

## Section 2: The Project

Business organizations encounter challenges with marketing strategies to promote brand image (Yang & Chiu, 2014). Business leaders develop strategies and advertisements to achieve organizational goals such as attracting new customers and retaining customers (Ababio & Yamoah, 2016). Marketing requires business leaders know the customer (Garg, 2012). However, some business leaders might lack marketing strategies, which have a negative impact in the efforts for attracting and retaining loyal customers. Some franchise small business leaders lack strategies for retaining customers, which may affect the business' profitability (Yang & Chiu, 2014). Section 2 includes the purpose of the study, the role of the researcher the research method, the research design, and an explanation of why the research method and design are appropriate for this study. This section includes a detailed discussion of the population and sampling, ethical research, data collection, data collection techniques, data organization techniques, data analysis, and reliability and validity.

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore the marketing strategies that franchise small business leaders used to retain customers. The population group consisted of franchise small business leaders 18 years or older in North Carolina with 3 years of marketing strategy experience within the organization and use retention strategies on a regular basis to retain customers. The data obtained from this study may influence social change, by enhancing the knowledge of franchise small business leaders advancing in the economy and making a difference in the lives and well-being of others.

Business leaders may use the results to develop marketing strategies and advertisements to attract potential customers and retain loyal customers. The results of this study might make a difference in the life of consumers by providing them with knowledge on how franchise small business leaders target different market segments, which will allow consumers to make better decisions regarding purchasing products or services.

### **Role of the Researcher**

My role as the researcher was to identify the participant selection criteria, recruit participants, collect data, and analyze the collected data. Qualitative researchers must clarify their roles while conducting research because they have a variety of member roles in the research setting (Unluer, 2012). For this qualitative multiple case study, I used the Chamber of Commerce website to find franchise small businesses in North Carolina. As the researcher, I contacted small business owners via telephone and written correspondence (see Appendix A) to explain the purpose of the study and to obtain permission to do this research study in their companies. The letter of invitation (see Appendix B) gave an explanation of the purpose and the intent of the study, disclosed my role as the researcher, the benefits of the study, and information regarding semistructured interviews with open-ended questions.

Data collection consisted of document review and semistructured interviews for a period of 4 weeks. The data collection method for this study included searching the small businesses' website for company documents such as published advertisements and marketing information such as newsletters, catalogs, and Internet advertisements used for retaining customers, which occurred for 2 days prior to interviews. I interviewed five

franchise small business leaders 18 years or older in North Carolina with 3 years of marketing strategy experience within the organization and use retention strategies on a regular basis to retain customers. Qualitative interviews provide rich and multi-sided data for analysis (Mikènè, Gaižauskaitė, & Valavičienė, 2013). Anyan (2013) stated that the qualitative research interview has a lopsided power distribution between the interviewer and the interviewee, where an interviewer might assume a unidirectional approach and the interviewees might have countermeasures. Mikènè, Gaižauskaitė, and Valavičienė (2013) argued that qualitative interviewing is not a simple conversation, but the life story of an informant and necessity to enquire the story from a variety of incommunicative informants. I used NVivo software to validate the data I analyzed and coded after I collected data to identify themes.

My affiliation with the research topic, participants, and geographical area is that I solicit the services of small businesses in the North Carolina area. In addition, I have experience working in higher education at a university in North Carolina. Unluer (2012) noted that insider researchers know how to best approach participants because researchers affiliated with the research site have knowledge of the politics of the institution.

I obtained approval from Walden's Institutional Review Board (IRB) to conduct research (10-15-15-0262982). The IRB process ensures the protection of human beings participating in research study are not being harmed (Jacob & Furgerson, 2012). History reminds researchers of previous unethical research that harmed human participants, and The Belmont Report exist due to unethical actions of researchers (Nurunnabi, 2014).

After I received IRB approval, I contacted franchise small business leaders via telephone and written correspondence (see Appendix A) to explain the purpose of the study. I recruited participants ensuring the protection of the participants' rights, privacy, and confidentiality. To assure that the ethical protection of participants was adequate, each participant received a letter of invitation (see Appendix B). After I received responses via e-mail or telephone from participants, I selected five participants meeting the criteria. Before conducting interviews, I had all participants sign an informed consent form, which included a statement that participating in this study was voluntary and participants may withdraw at any time (see Appendix C). According to Jacob and Furgerson (2012), participants should understand that they may withdraw from the study at any time and participants that decline signing the consent form should not be encouraged to grant consent.

I received a certificate of completion for certification of ethical measures (Appendix D). I informed participants that disclosure of their identity and demographics such as gender and race was not necessary. My data retention plan was to store the data collection on a password protected USB drive and all other documents connected to study in a locked safe for 5 years.

Although I do not have a relationship with participants, I eliminated my opinions and experience with the phenomenon and took steps to reduce bias in my perspective as the researcher. Yin (2014) stated that testing for bias is possible when collecting data if the researcher is open to contrary findings. I was open and transparent with the participant to ensure privacy and confidentiality. I respected the participants' privacy and

confidentiality by using ethical measures such as obtaining IRB approval, bracketing my opinions, and allowing participants to withdraw from the study without penalty.

I used an interview protocol (see Appendix E), which served as a guide for the interview process to ensure the reliability of the interview process. An interview protocol establishes a procedural guide to help pave qualitative researchers' interview process (Jacob & Furgerson, 2012). According to Rubin and Rubin (2012), researchers prepare in advance an interview protocol, which is a written version of the research questions and interview process.

### **Participants**

The general population group and participants for this study consisted of franchise small business leaders 18 years or older in North Carolina with 3 years of marketing strategy experience within the organization and use retention strategies on a regular basis to retain customers. The five franchise small businesses represented the larger population of franchise small businesses registered with the Chamber of Commerce. The selection of individuals meeting set criteria is to gain understanding from key participants' experiences (Suri, 2011). By identifying the selection criteria, the participant selection process does not intend to target vulnerable populations. The rationale for selecting participants that meet the selection criteria is to gain an understanding of the phenomenon within relevant circumstances (Stake, 2006).

To gain access to participants, I contacted franchise small business leaders via telephone and written correspondence (see Appendix A) to explain the purpose of the study. I contacted the business leaders during business hours to schedule a date and time

to meet with potential participants. According to Englander (2012), the researcher is responsible for finding and selecting participants who meet the expected criteria of the phenomenon. Robinson (2013) noted researchers can recruit participants via advertising which includes methods such as, print, face-to-face, and online. Finding participants that meet the criteria of the study is difficult and depending on the phenomenon an issue (Englander, 2012).

To establish a working relationship with participants, I visited the small business to introduce myself and explain information regarding the research study. The relationship between the researcher and the participant is of shared influence, and they are recognized individually (Rubin & Rubin, 2012). Therefore, researchers must address ethical concerns that may arise such as acknowledging bias, building rapport, avoiding exploitation, and maintaining confidentiality (Hanson, Balmer, & Giardino, 2011). The researcher should manage his or her relationships with the participant to avoid a potential exploitative relationship; therefore, the researcher should be mindful of ethical implications (Houghton et al., 2013). Each participant received a letter of invitation (see Appendix B) and a copy of the consent form that the participant signed at the time of the interview (see Appendix C). Participants responded via e-mail and indicated their interest to participate in the research study. I informed participants by e-mail of their scheduled interview date and time.

## **Research Method and Design**

### **Research Method**

There are three different methods of research: qualitative, quantitative, and mixed methods (Williams, 2007). The research method for this study was qualitative. Bansal and Corley (2012) indicated qualitative research allows the researcher to share in real-life experiences of participants in the form of a story. Qualitative research allows the participants to disclose their experiences openly for the researcher to understand the phenomenon (Moustakas, 1994). Qualitative research shows quality when creativity in exploring the fields of study consists of new insights and perspectives, and findings not limited to the expected outcome (Flick, 2007). The justification for selecting a qualitative study is it allows the exploration of research in the real world environment (Marshall & Rossman, 2016). Using qualitative research will help with understanding the patterns and behaviors perceived by customers regarding advertising mediums (Percy, Koster, & Kostere, 2015). A qualitative research method allowed participants to share and give rich details on their views of marketing strategies used at a small business. Barnham (2012) indicated qualitative research method has more depth and insight than a quantitative research study. The qualitative research method and the advocacy or participatory worldview will give the researcher an opportunity to find out in-depth experiences of participants who are willing to share details on what marketing strategies small business leaders can develop for retaining customers (Yin, 2014).

Quantitative research was not an option in this study. Quantitative methods consist of measuring and testing variables to determine whether a relationship or theory



exists, and creating an analysis to assist with understanding the findings (Wahyuni, 2012). In a quantitative study, relationships with participants do not exist, nor does the experience of observing the participants visually exist because there are no participants, only statistical data (Williams, 2007). The use of quantitative research narrows the understanding of the study (Petty, Thomson, & Stew, 2012). Therefore, a quantitative research method was not an appropriate research method for this study.

Mixed-methods research consists of both qualitative and quantitative methods, which includes collecting, analyzing, and integrating data of a single study or multiple studies (Polit & Beck, 2010). The mixed-methods research approach creates a different level of understanding for each research method that creates a wealth of knowledge and compliments each method (Venkatesh et al., 2013). Williams (2007) asserted mixed-methods allow researchers to construct theories that include quantifying data and exploring phenomenology. A mixed-method was not appropriate for this study because it does not entail quantifying or statistical data.

### **Research Design**

This study was a qualitative multiple case study research design. The qualitative case-study research design was the best fit for this study because it allowed exploration of what marketing strategies small business leaders can develop for retaining customers. Researchers use the case study design when trying to gain insight on a problem that has extremely limited knowledge (Williams, 2007). The problem consists of one or more individuals, event, activity, or program studied and analyzed in deep detail (Yin, 2014).

Case study research provides an understanding of individuals' experiences, issues, insights, developmental pathways in rich detail (Duff, 2014).

A qualitative case study approach was the best research design for this study. Researchers using the case study design focus on understanding the current research subject without intervening (Unluer, 2012). Stake (2006) stated that qualitative case studies require experiencing of cases operating in real contexts or situations as the activity of the case occurs. Yin (2014) found the case study method arises out of the desire to understand difficult social phenomena, which allows researchers to retain the holistic and important characteristics of real-life events. Stake (2006) asserted case study research allows the researcher to gain a general understanding and insight about the research question by studying a particular case. Duff (2014) indicated one of the primary approaches used in social sciences to conduct inquiry is case study research. Hyett, Kenny, and Dickson-Swift (2014) concluded that the increasing trend of researchers conducting qualitative case studies have significantly contributed to the field of operations management and the area of theory building. The qualitative case researcher interpretations are to preserve the multiple realities and the different views of the participants to understand how they see things (Stake, 2006).

Other research designs were phenomenology, ethnography, grounded theory, and narrative. The phenomenological research design allows interacting with participants and sharing of their lived experiences through interviews consisting of open-ended questions (Englander, 2012). In phenomenological research, the researcher focuses on a particular topic that constructs a research question, which guides the study (Moustakas, 1994).

Phenomenological research starts with acknowledging the need for understanding the phenomenon of lived experiences, because the researchers' goal is to determine the meaning of a specific phenomenon (Englander, 2012). In phenomenological research, perception is knowledge and perception adds insight to the experience that cannot be doubted (Moustakas, 1994). A phenomenology design was not an appropriate fit for this study because the purpose of this study was to learn insights regarding customers' responses to marketing strategies within a real-life context. The ethnography design focuses on cultural or ethical groups. Ethnography is an approach for studying groups and processes in their natural settings to document social processes (Flick, 2007).

Ethnography research requires exploring, planning, focusing on conducting the research, which includes gaining approval to observe and participate in the collection of data (Moustakas, 1994). Ethnography requires researchers to spend excessive amounts of time interacting with participants and observing participants, which needs flexible use of methods and patience in the field (Kruth, 2015). According to Williams (2007), data collection in ethnography is from participant observations, interviewing several key informants and gathering documentation by using audiotapes or videotapes media. Therefore, the ethnography design was not the best research design for this study.

Narrative research consists of studying a phenomenon from the reflections of participants and data collection includes extensive interviews with the participants, observations, and documents (Bernard, 2013). According to Hanson, Balmer, and Giardino (2011), written narratives may provide reflections about participants' experiences to generate detailed stories and longer written reflections, which may provide

the data needed to build in-depth understanding about research questions. A narrative approach translates ideas and practices of individuals into a story with meaning and purpose (Hancock & Epston, 2013). The narrative research design was not the best design selection for this study because the focus of this study was to explore small business customers' responses to small business leaders' marketing strategies.

To assist in reaching data saturation, participants participated in member checking follow-up interviews. Follow-up interviews occur when the examination of interview transcripts show insufficient information on ideas from the interviewee and concepts that needs clarity, which suggest the need for thoroughness through follow-up (Rubin & Rubin, 2012). Qualitative researchers employ the emergent theory approach that relies on the saturation-sampling model for ensuring validity and reliability (Trotter, 2012).

### **Population and Sampling**

The general population consisted of four franchise small business leaders 18 years or older in North Carolina. The specific sample population consisted of five franchise small business leaders 18 years or older in North Carolina with 3 years of marketing strategy experience within the organization and use retention strategies on a regular basis to retain customers. Thus, the selection process does not target vulnerable populations. The participant selection method consisted of purposeful sampling. According to Suri (2011), purposeful sampling requires selecting individuals that meet pre-determined criteria. Purposive sampling gave the in-depth quality information required for the study because the selected participants were knowledgeable and were able to share their expertise on the purpose of the study. Purposeful sampling allowed me to select

participants with shared experiences or concerns with the phenomenon. According to Suri (2011), purposeful sampling provides access to key informants in the field who can help in identifying information-rich cases. In qualitative research, researchers use purposeful sampling based on sample characteristics and relevant eligibility criteria rather than probability-based representative samples (Palinkas et. al. 2013). Polit and Beck (2010) indicated purposive sampling is mainly in qualitative research and includes techniques that include intentional duplication that can encourage analytic generalization and transferability.

The sample size consisted of five franchise small business leaders 18 years or older in North Carolina with 3 years of marketing strategy experience within the organization and use retention strategies on a regular basis to retain customers. The purposeful selection of five franchise small business leaders represented a larger group of 18 franchise small business leaders. The qualitative research method enabled me to gain an in-depth understanding of the phenomenon to explore customers' responses to franchise small business' marketing strategies. Englander (2012) noted the collection of data begins with the selection of participants in qualitative research. Francis et al. (2010) indicated sample size in research does matter, where a sample size too large or too small can cause significant ethical issues including the cost associated with research and the time dedicated by participants. The determination of samples size adequacy is by the relevance of data and the number of participants (O'Reilly & Parker, 2012).

In this qualitative study, I used a multiple case study research design to explore the marketing strategies of franchise small business leaders. To achieve data saturation, I

conducted follow-up interviews with participants. According to Rubin and Rubin (2012) follow-up interview questions enhances the achievement of new interpretations, accomplishes a profound understanding, and adds rich information that assists in the presentation of strong and vivid evidence for conclusion. Francis et al. (2010) noted that saturation might occur after four to 15 interviews. The number of participants will balance the availability of limited resources and the need to collect enough data to achieve data saturation (O'Reilly & Parker, 2012).

The criteria for selecting participants for this study were as follows: (a) franchise small business leaders in North Carolina, and (b) age 18 or older, and (c) with 3 years of marketing strategy experience within the organization and (d) use retention strategies on a regular basis to retain customers. I selected an interview setting at each business location in North Carolina making the location convenient and comfortable for the participant's safety and confidentiality. I conducted the interview in a leader's office in the business. According to Mikèné et al. (2013), methodological literature recommends that researchers conduct qualitative interviews in an environment that is comfortable and non-disturbing for the participants. Conducting research in a public environment can create a problem because of the risk of additional people and not knowing who to obtain informed consent and by what means (Houghton et al., 2013). Jacob and Furgerson (2012) indicated libraries are an excellent place to conduct interviews because they are easy to locate, good parking, non-threatening, safe, and quiet which allows a quality recording to be made. Maintaining confidentiality is important in relation to individual participants and locations where research is conducted (Houghton et al., 2013).

### **Ethical Research**

In qualitative research, there may be social or psychological risks, such as possible harm to a participant's reputation or discomfort associated with discussing sensitive issues. I adhered to the guidelines of data collection by respecting the participants in my study and by not putting them at risk. The federal regulations and Walden University require researchers to follow IRB guidelines to protect against the violation of human rights. Scholars must demonstrate the ethical acceptability of their projects to IRB at the institution authorizing the research study by completing an ethics training course, submitting a research design, and adjusting the research to avoid undue risk to participants (Lee et al., 2013). Once I received IRB approval, I contacted franchise small business leaders via telephone and written correspondence (see Appendix A) to explain the purpose of the study. I communicated with the franchise small business leaders to set a date for me to visit the business to introduce myself.

I provided potential participants with an invitation for participation (see Appendix B) that informs participants of the purpose of this study, the intent of the study, and the benefits of the study. Each participant received a copy of the consent form that the participant signed at the time of the interview (Appendix C). According to Hanson et al. (2011), both quantitative and qualitative research must address informed consent, benefits and reciprocity, cost and risks, privacy and confidentiality, anonymity, and dissemination of the research findings. The consent form included identification of the researcher, the sponsoring institution, the criteria for participation, the purpose of the research, possible benefits for participating in the study, participant involvement, and the risk. I informed

participants that they may withdraw from the study via telephone, e-mail, or written notification at any time. I also included my contact information in case participants had questions. Researchers cannot guarantee the collection of data from participants, therefore an informed consent process makes it easier to negotiate and revise arrangements throughout the study, and the researcher must inform the participant of the right to withdraw from the study at any time (Houghton et al., 2013). There were no incentives for participating in this study.

Participants' names, gender, or personal demographic information were not relevant in this research study; therefore, franchise small business leaders were not provided this information and identification were S1 through S5. Case study research explores the personal views and circumstances of the participant, which makes implementation of vigorous approaches essential to ensure the protection of the participant's identity and confidentiality (Houghton et al., 2013). The data retention plan included storage of the data on a password protected USB drive and all other documents that have a connection to the study in a locked safe for 5 years. I will delete data from electronic files, paper files were destroyed by shredding, and all files will be destroyed after 5 years of storage.

### **Data Collection Instruments**

As the qualitative researcher, I was the primary instrument. My role as the researcher included collecting data, which required searching small businesses' website for company documents and interviewing franchise small business leaders to gain insight from the participants' experiences. The role of the researcher in qualitative research



requires a new way of thinking in terms of evidence because evidence is not a given, but is a contested issue of how different views of evidence influence the researchers role (Xu & Storr, 2012). Collecting data using documentation allows case study researchers to corroborate and augment evidence from semistructured interviews regarding marketing strategies used to retain customers (Yin, 2014). Pezalla, Pettigrew, and Miller-Day (2012) indicated the influence of collecting realistic data attributes to the unique characteristics of the researcher as the instrument conducting semistructured interviews. The quality of the collection of data is dependent on the researcher as instrument experience in conducting interviews, observation, and field notes (Xu & Storr, 2012).

For this qualitative multiple case study, I used semistructured interviews and documentation for the sources of data collection. The sources of data collection for case studies include documentation, archival records, direct observations, participant-observations, interviews, and physical artifacts (Stake, 2006; Yin, 2014). To collect company documentation, I researched the small business' website and library archives to obtain copies of previous advertisements and marketing information such as newsletters, catalogues, and Internet advertisements developed by the business leaders. According to McKee and Porter (2012), researchers encounter ethical issues in archival research throughout the research process, because they consider critical questions regarding how archivists organize, maintain, and determine access to collections. Yin (2014) stated that the most important use of documents is to provide other specific details to corroborate and augment evidence from other sources.

The data collection consisted of semistructured interviews of five franchise small business leaders in North Carolina as the secondary data collection instrument. I used open-ended questions during the interview (see Appendix F). Using semistructured interview questions generated data on marketing strategies that some franchise small business leaders use to retain customers. The objective of semistructured interviews is to collect data without influencing the story of the interviewee (Denzin, 2012a). According to Qu and Dumay (2011), interviews are significant data collection tools, which provide researchers a useful way to learn about other's world. During the interview process, relationships exist between the researcher and the interviewee that reflects a mutual influence because the interviewees' answers suggest to the researcher how best to respond (Rubin & Rubin, 2012). I communicated with the small business owners to set a date for me to visit the small business to introduce myself to potential participants and briefly explain information regarding the research study. Each participant received a letter of invitation (see Appendix B) and a copy of the consent form (Appendix C). After I received responses via e-mail from participants, I setup an interview time and location. The interview process, which was 30 to 60 minutes, included participants signing the consent form by each participant before the interview. During the interview, participants answered open-ended questions located in the text of the study and (Appendix E).

The interview protocol was necessary in my study and tested the reliability of the data collection process. Assessment of quality in qualitative research consists of the broad concepts of reliability, validity, and relevance by including a semistructured template for fieldwork, standardized tool to extract content from documents for

documentary analysis, and interview guides (Bourgeault, 2012). An interview protocol is a procedure guide to help direct the researcher through the interview process to ensure the collection of all data from the participant and includes a script on what the interviewer should say to the participant before, during, and at the conclusion of the interview (Jacobs & Furgerson, 2012). I recorded the interviews using the Livescribe Smartpen. I stored the transcribed interviews as Microsoft Word documents by using Evernote software. To establish reliability, I incorporated member checking by emailing participants a copy of the transcripts and conducting follow-up interviews to ensure the accuracy of my interpretations of their interview responses. According to Rubin and Rubin (2012) follow-up interviews enhances the achievement of new interpretations, accomplishes a profound understanding, and adds rich information that assists in the presentation of strong and vivid evidence for conclusion. The process of member checking validates an understanding of the correct data collected and the correct interpretation of the data collected by the researcher from the participants strengthening accuracy, validity, and credibility (Harper & Cole, 2012). I used NVivo software to validate the data I analyzed and coded after I collected data to identify themes.

The process for assessment of validity was to check for accuracy, triangulate, use rich description, and clarify bias. I enhanced validity by using multiple sources of evidence, which included company documents, interviews, and the pilot study interviews. The multiple sources will deliver multiple measures of data for the same phenomenon, adding the advantage for the development of converging lines of inquiry, a process of triangulation and corroboration (Yin, 2014). Hanson et al. (2011) suggested using

multiple sources of data adds rigor to the study by triangulating data to gain a thorough understanding of the same phenomenon.

### **Data Collection Technique**

I gained approval to conduct research from IRB. I contacted franchise small business leaders via telephone and written correspondence (see Appendix A) to explain the purpose of the study. I communicated with the franchise small business leaders to set a date for me to visit the business to introduce myself. I provided potential participants with an invitation for participation (see Appendix B) that informs participants of the purpose of this study, the intent of the study, and the benefits of the study. Each participant received a copy of the consent form that the participant signed at the time of the interview (Appendix C). After receiving responses verbally, via e-mail or telephone from participants, I selected five participants meeting the criteria.

Data collection instruments included document review and semistructured interviews for a period of 4 weeks. The case study research design requires researchers to spend extensive time at the research site interacting with the participants and data collection from multiple sources (Williams, 2007). Yin (2014) believed that interviews are an important source when conducting case studies. The advantage of documentation is being able to review documents as many times as needed and for verifying information such as names of businesses, titles and the correct spellings from interviews (Yin, 2014). A disadvantage of documentation is the participant may not want to share such information and intentionally withhold documentation (Yin, 2014). The advantage of semistructured interviews includes popularity, flexibility, capability of disclosing hidden

information and allowing the researcher to learn the views of others while modifying the style, pace, and ordering of questions (Qu & Dumay, 2011). The disadvantage of semistructured interviews is displaying response bias (Yin, 2014).

The data collection for this study included searching the franchise small businesses' website and library archives for previously published marketing information such as newsletters, catalogs, and Internet advertisements used for retaining customers, which will occur for 2 days prior to interviews. According to Bourgeault (2012), a multi-method qualitative study involves the collection and triangulated analysis of documents and key informant interviews. Documents are inputs to the interview guide that are useful for saving time in interviews, for tracing the history of the organizations and statements made by key people in the organizations, and counteracting the biases of respondents (Singh, 2014).

To conduct this qualitative multiple case study, I used semistructured interviews to explore the marketing strategies franchise small business leaders used to retain customers served as the secondary data collection technique. Qualitative researchers rely on in-depth standardized interviews often used in multiple case studies for data collection until no new information emerges from data collection (Marshall, Cardon, Poddar, & Fontenot, 2013). Using semistructured interviews in the qualitative case study approach was beneficial for obtaining rich information that might assist small business leaders with marketing strategies that affect customer purchasing decisions. Data collection should include thick and rich information on the participants' perspective of a specific issue (Wahyuni, 2012). I provided participants with a list of dates and available times and had

participants respond via e-mail to confirm a date and time for an interview. I scheduled the interviews for 30 to 60 minutes at a public location convenient, confidential, and comfortable for the participant. One week before the interview, I sent the participant an e-mail reminding them of the scheduled interview, the date, time, and location. Prior to conducting the interview, I provided participants with the purpose of the interview, an informed consent letter, interview recording procedures, and the withdrawal option without penalty. Participants signed the consent form at the time of the interview. Rubin and Rubin (2012) asserted researchers gain thick and rich insight from in-depth interviews from others by revisiting and exploring their perspective of a specific issue in which they had no participation.

I transcribed interviews into a Microsoft Word document and used Evernote software to securely store audio-recorded interviews. I emailed each participant a copy to review my interpretations of their responses and conducted follow-up interviews for member checking, which ensured reliability and validity. Member checking is presenting a draft copy of an observation or interview to the participants providing the information and asking for correction and comment (Stake, 2006). In qualitative research, member checking increases rigor of the study and verifies accuracy when participants review interview transcripts (Houghton et al., 2013). Incorporating member checking into the design of the study ensures confidentiality (Houghton et al., 2013). I provided participants with a summary of the results within 2 weeks after completing the study.

A pilot study to test the reliability of the interview process in terms of usefulness in answering the central research question of the study was necessary. The conduction of

a pilot study is essential to improve the questions, structure, and to make any necessary adjustments (Yin, 2014). The pilot study will assist in making sure the instrument is consistent and will alert the researcher of any problems prior to performing the full study (Marshall & Rossman, 2016). The pilot study consisted of emailing two of the five participants an invitation to participate in the pilot study (see Appendix G). According to Yin (2014), the pilot study reports should be explicit about the lessons learned for modification of both the research design and field process. Elo et al. (2014) asserted that the use of pre-interviews could determine whether the collection of enough thick, rich data from the interview questions to answer the research question. The participants replied consenting to participate in semistructured interviews (see Appendix H). I asked the participants questions regarding the interview questions and process to receive feedback from participants after the interview (see Appendix I).

### **Data Organization Technique**

The data organization technique for recorded interview data and recorded reflective notes was to store the information on a password-protected digital recorder. I stored all the participants' electronic files including interview transcripts on a password protected USB drive to ensure confidentiality. Mealer and Jones (2014) stated that privacy and confidentiality are imperative in the protection of the participants' information. Participants are always concerned with confidentiality and anonymity when participating in research (Namageyo-Funa et al., 2014). The participant's identity should remain anonymous to ensure confidentiality (Wagstaff, & Williams, 2014). The participants have an individual folder stored on a USB drive and labeled identifying the

participant by identification number S1 through S5. Participant's identification was a number used throughout the study. Using a number to identify participants enforced privacy and confidentiality. Mozaffari, Peyrovi, and Nayeri (2015) stated using code names protect the identity of participants. During the data entry process, a unique coding number will serve as identification for each participant (Siriwardhana, Adikari, Jayaweera & Sumathipala, 2013). Using specific coding such as firm one (F1) of collected data allows for participants confidentiality and identification of the participant or organization (Wahyuni, 2012).

Storage of the company documents, password-protected digital recorder, and USB drive will consist of placing the items in a locked safe that is inaccessible to other parties. I will store all information safely in my home in a safe for 5 years to protect the privacy of the participants. Qualitative research represents a study that depends on trust based on a core commitment of confidentiality (Pollock, 2012). After storing data for 5 years, I will destroy the data by erasing from the USB drive and password-protected digital recorder and shredding of hard copy documents using a professional service. According to Khan (2014), researchers should store data in a locked safe or on a password-protected device to protect individuals' confidentiality. An important consideration for conducting data management under qualitative studies involves data storage, transcribing audio sources, and cleaning the data (Wahyuni, 2012).

### **Data Analysis**

Data analysis consisted of using methodological triangulation for the case study design. Methodological triangulation provides confirmation of findings, data that are



more comprehensive, and increase validity (Bekhet & Zauszniewski, 2012).

Triangulation is an alternative to validation (Flick, 2007). Denzin (2012b) added that triangulation reflects an attempt to secure an in-depth understanding of the phenomenon.

I employed methodological triangulation for this study using semistructured interviews and documentation. The use of multiple qualitative data collection sources enhances methodological triangulation and ensures validity (Hallbäck & Gabrielsson, 2013).

Bekhet and Zauszniewski (2012) noted that methodological triangulation involves using multiple methods to research a phenomenon.

Data coding consisted of using NVivo software to identify reoccurring themes within the transcribed data. The use of the themes and categories helps support the sampling of the population through information from interviews and to establish saturation, which determines duplication of information (Polit & Beck, 2010). The value of using computer-aided qualitative data analysis software was NVivo assisted me with organizing my unstructured data in this qualitative study. NVivo 10 software is a user-friendly software program that offers an easy to use format to help researchers sort, organize, and classify data to assist with finding an answer to the research question of a study (Castleberry, 2014). Computer software is used to aid in research management, organization, and analysis in academic research to make a tedious procedure more time efficient, manageable, and consistent (Goble, Austin, Larsen, Kreitzer & Brintnell, 2012). Software such as NVivo helps with the reduction of researcher bias and data accuracy (Goble et al., 2012).

The objective of this qualitative multiple case study was to explore the marketing strategies that franchise small business leaders use to retain customers. The research question was as follows: What marketing strategies do franchise small businesses leaders use to retain customers? Findings from the study may contribute information that supported whether the marketing strategies are effective to retain customers.

In relation to Porter's competitive advantage theory, the coding of data into themes might reveal pertinent information about the different types of strategies small business leaders use to create a value for buyers with minimal cost to the firm (Porter, 2008). For example, small business leaders might develop a marketing strategy for an Internet advertisement on a social media website or a sponsor's webpage. The findings from data analysis might assist to increase the understanding of the relationship between advertising and leaders achieving organizational goals to create a blue ocean strategy. Some small business owners might desire to create an untapped market space to increase growth and profit by developing marketing strategies for brand positioning that contribute to gaining a competitive advantage in the global market (Chandrakala & Devaru, 2013; Wubben et al., 2012).

### **Reliability and Validity**

#### **Reliability**

Testing of reliability and validity were important components in this qualitative research study. Reliability is the degree to which measures are free from error and should yield consistent results (Lakshmi & Mohideen, 2013). Reliability is the reassurance that another researcher investigating the same issue or using the same data could derive the

same or similar findings (Ali & Yusof, 2011; Lakshmi & Mohideen, 2013). I addressed dependability by using an interview protocol and conducting a pilot study. Rubin and Rubin (2012) stated that the interview protocol serves as the researchers' mental framework and guide during the interview conversation. To address dependability, I used member checking. Researchers use member checking to establish the reliability of my interpretations of the collected interview data (Black, Palombaro, & Dole, 2013). According to Hanson et al. (2011), methods to establish reliability and dependability include involving more than one researcher in data analysis, coding emerging themes, devising rigorous data analysis procedures, and member checking.

### **Validity**

In this multiple case study, I used member checking and methodological triangulation of evidence to establish validity for accuracy along with checking procedures and trustworthiness of research. Validity is through the reviewing of the data collected to establish whether the findings are credible or transferable (Lakshmi & Mohideen, 2013). Determination of validity in qualitative research is by ensuring trustworthiness, which includes credibility, dependability, conformability, and transferability of the data collected (Hanson et al., 2011). Elo et al. (2014) indicated the best strategy to guarantee trustworthiness for researchers starts with the selection of the best data collection technique to obtain answers to the research questions. I used member checking and methodological triangulation to ensure validity. Methodological triangulation included retrieval of documentation and conducting semistructured interviews. Yin (2014) indicated various sources of data, such as interviews, and retrieval

of documentation will support triangulating evidence. Triangulation aids the researcher with establishing validity when the method of examining data from secure sources or experiences from participants are credible, building justification of data coding and themes of study (Denzin, 2012b). Establishing validity is through triangulation of data collected and member checking to establish the accuracy of data collected from participants to ensure no bias (Lakshmi & Mohideen, 2013).

Researchers may establish credibility by using methods such as triangulation, gathering of rich-descriptive information, and detailed interview techniques (Hanson et al., 2011). I used an interview protocol as a guide and multiple sources of data collection. Using multiple data sources helps researchers establish credibility when conducting case studies (Yin, 2014). To test for credibility using member checking, franchise small business leaders participated in follow-up interviews for ensuring that my interpretations of their responses are accurate. The process for member checking is to ask participants to read the final report to confirm accuracy of the interpreted information and provide feedback for completeness (Harper & Cole, 2012).

Measures to address transferability included using rich, thick descriptions to convey findings, eliminate researcher bias, and ensure data saturation. Houghton, Casey, Shaw, and Murphy (2013) concluded that dependability and transferability are two strategies used to assist with determining the rigor for the framework of qualitative research. To address transferability, I included a detailed description of the research procedures for data collection and analysis to convey findings, in which other researchers may make judgments about the potential for applying the research process to other

contexts. Transferability refers to the reasoning that future researchers may transfer research processes and findings to other groups and supports trustworthiness by reporting an accurate content analysis (Elo et al., 2014). Houghton et al. found that thick descriptions of raw data allow for consideration of alternative interpretations and helps to improve the transferability of the study.

I addressed confirmability by using reflexivity consisting of audio recording biases and insights regarding the research process, as well as transcribed the recordings verbatim. Reflexivity is a tool researchers practice to represent the information gained from participants that examines the researcher's involvement, knowledge, and behavior (Clancy, 2013). To promote reflexivity, researchers may ask a question, which helps researchers perceive and modify their thoughts, feelings, and actions (Steen, 2013). To achieve credibility and confirmability, I devised rigorous data analysis procedures by using NVivo software. Conducting data analysis using NVivo software acts as an audit trail by running queries to locate all passages from all participants that matched the query criteria and confirming more than one participant, shared the same opinion (Houghton et al., 2013). According to Black, Palombaro, and Dole (2013), contributions to confirmability include a detailed audit trail, reflexivity, and triangulation which enhances trustworthiness. Confirmability can be achieved by maintaining an audit trail and running queries via qualitative data analysis software (Houghton et al., 2013).

The ideal standard for qualitative approaches rely on saturation, which is the process of sequentially conducting interviews without new concepts or themes emerging, as a marker for sample size adequacy (Trotter, 2012). Ali and Yusof (2011) asserted the

data collection should be until saturation to achieve reliability. The participants for this study included five franchise small business leaders. To achieve data saturation, I reviewed company documents and conducted semistructured interviews with franchise small business leaders until participants provided no new information, no new codes, no new themes, and the results were repetitive. O'Reilly and Parker (2012) concluded that qualitative researchers using an inductive approach have a focused idea and a related research agenda, which guides the direction of the data collection and creates parameters for achievement of saturation. The franchise small business leaders gave their personal experience on how the marketing strategies influenced customers to remain loyal to the small business in North Carolina. The participants provided vital information to help identify what measures may help small business leaders develop marketing strategies to retain customers.

### **Transition and Summary**

The purpose of this study was to explore the marketing strategies franchise small business leaders use to retain customers. Section 1 consisted of the background, the problem statement, the purpose statement, the research question, and other areas of importance. Section 2 consisted of the purpose of the study, the role of the researcher, participants, and population and sampling methods. In addition, Section 2 included the research method and design, data collection technique, ethical research, data organization techniques, data analysis technique, and reliability and validity. Section 3 of this study includes the problem statement, research question, a brief summary of the findings, application of professional practice, and implications for social change. Section 3

concludes with recommendations for further research, reflections, and conclusion of the study.

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

Section 3 includes an introduction, the purpose of the study, presentation of the findings relating to the research question and the conceptual framework. Section 3 contains the application to professional practice, implications for social change, and recommendations for action and further research. This section also consists of a detailed analysis of research findings' themes, discussions of how the findings and themes apply to professional practice to improve the organization's effectiveness. Section 3 concluded with my reflections and the summary and study conclusion.

#### **Introduction**

The purpose of this qualitative multiple case study was to explore the marketing strategies that franchise small business leaders use to retain customers. The results of this study revealed the participants expressed that marketing strategies are a fundamental practice for business operations and profitability. The documentation included brochure booklets, full-page brochure, newspaper advertisement, business cards, feedback card, greeting card, folder, flyers, insert, promotional gifts, promotional coupons, and promotional card. Cheney, Gowin, and Wann (2015) conducted a study on the marketing strategies vapor storeowners used to attract and retain customers. Owners determine their choice of marketing strategies by the funds available for advertising; therefore, they use alternative strategies to retain customers because of the small budget for marketing (Cheney, Gowin, & Wann, 2015). The analysis of this research indicated that the franchise small business leaders agreed that having effective marketing strategies are significant aspects for customer retention. The findings of this research study indicated



that using both traditional marketing strategies and innovative strategies has been an effective approach. The findings from this study also indicated that using all avenues to contact customers to share information about the company's products or services has been beneficial as a marketing strategy.

The results of this study revealed that participants expressed that customer retention is a fundamental aspect for business effectiveness. The analysis of this research indicated that the franchise small business leaders agreed that ineffective marketing strategies for customer retention could affect profitability. According to Chesnokova, Oksana, Radina, and Serdyuk (2014), retaining customers has the advantages of less complications and costs, while ensuring stability of profit and profitability. Abdolvand, Baradaran, and Albadvi (2015) agreed that the significance of customer retention in business strategies is the opportunity for business leaders to increase the value of their customers while reducing costs. Each participant stated that the basic customer retention strategies include great customer experiences, customer satisfaction, excellent customer service, and customer appreciation. Customer satisfaction is an essential part of techniques organizational leaders use to measure performance (Horne, 2015).

### **Presentation of the Findings**

This qualitative multiple case study sought to answer the following research question: What marketing strategies do franchise small businesses leaders use for retaining customers? For data collection, I used company documentation review and semistructured interviews. I conducted a pilot study to ensure the accuracy of the data collection instrument before proceeding with the main study. Although the initial

intention was to conduct interviews with five franchise small business leaders, one participant withdrew from the study. Four franchise small business leaders participated in semistructured interviews, in which I achieved data saturation because the responses shared by the final participant added no new information. In addition, I conducted follow-up interviews to ensure accuracy of the participant's responses. Franchise small business leaders' identification was S1 through S4. To ensure the reliability and validity of this study, I used member checking and methodological triangulation. I used NVivo10 software for coding the collected data and analyzing the emerging themes. The following themes emerged during data analysis: (a) personalization of customer service, (b) market segmentation, (c) innovative advertising, (d) networking, (e) brand identity, and (f) loyalty programs. These themes were consistent with the company documents reviewed for triangulation. Table 1 shows the participant frequency for the themes that related to each node.

Table 1

*Coding of Participants' Responses Related to Themes*

Themes	Participants	Reponses
Personalization of Customer Service	4	21
Market Segmentation	4	13
Innovative Advertising	3	12
Networking	4	11
Brand Identity	3	10
Loyalty Programs	3	9
Total (duplicated)	21	76

Note: Participants= the number of leaders answering interview questions.  
Responses= the number of participant responses linked to the themes.

### **Theme 1: Personalization of Customer Service**

Personalization of customer service emerged as the first theme relating to marketing and customer retention strategies. Personalization, which increases customer adoption of services, can be both an effective and an ineffective marketing strategy (Aguirre, Mahr, Grewal, de Ruyter, & Wetzels, 2015). Providing the customer with a personal touch to express your appreciation for the customers' patronage helps to retain customers. Aguirre et al., (2015) defined personalization as a customer-oriented marketing strategy that leaders use to deliver relevant information to customers at the right time. A participant from the first franchised small business stated to retain customers the organizational leaders personalize the products or service to the audience. The documentation provided information that was personalized to the brand. Many organizational leaders employ data analytics to design their marketing and personalized promotions for customers (Asllani & Halstead, 2015). The same participant indicated that personally contacting customers for feedback and providing the customers with personalize gifts contributes to customer retention. Another participant stated that the business leaders stay in contact and send the customers personalize gifts is a great marketing strategy for customer retention. The consensus among both franchise small business leaders was that personally contacting customers, obtaining customer feedback, and providing the customers with personalize gifts is a great marketing strategy for customer retention.

Business leaders must engage an effective system to evaluate the organization's performance based on the customer's feedback (Horne, 2015). Business leaders must

learn significant information about their customers to personalize services to the customers' needs (Aguirre et al., 2015). For example, a participant shared that the leaders provide personalized customer satisfaction by treating the customers with honor, dignity, and respect, as well as personalize events such as a father and daughter or mother and son date night. Another participant stated that personalization of customer service for the franchise small business leaders within the organization consisted of assisting customers by walking through the aisles to find the products they need. The personalized brochures, insert, newspaper advertisement, flyers, promotional coupons and promotional card gave customers a personal view of what product and services the franchise small businesses had to offer customers. Therefore, marketing managers should focus on customers with long-term profit potential when allocating marketing resources for personalized promotions (Asllani & Halstead, 2015).

## **Theme 2: Market Segmentation**

Marketing segmentation emerged as the second theme relating to marketing strategies. Marketing strategy includes segmentation, targeting, product differentiation, and product positioning (Lotayif, 2016). The results of this study revealed the participants conveyed that marketing segmentation is important for retaining existing customers, as well as attracting new customers. Based on the company documents provided for review, the franchise small businesses demonstrated that the marketing materials differed for each target audience. Target marketing involves the examination of ease of entry, reversibility, and fit to help define a choice set of markets (Man, 2015). Two participants conveyed the importance of assessing a target market by learning demographic

information about targeted customers and communities. According to Man (2015), ease of entry-markets has low entry barriers, whereas high reversibility markets have high entry barriers and require a lot of time to penetrate. Another participant from the second franchised business shared one marketing strategy used to reach the target market was to print advertisements in English and Spanish. The documentation provided different product and services to different market segmentation. The product positioning included using brochures, insert, flyers, newspaper advertisement, promotional items, and company websites. The documentation targeted the different market of customers and provided information on the different products and services offered by the franchise small businesses by demographics. The process of market selection starts with the appropriate marketing strategy and a successful segmentation process (Lotayif, 2016).

### **Theme 3: Innovative Advertising**

Innovative advertising emerged as the third theme. Advertising is a powerful and effective promotional tool that marketing leaders use to influence customers via information, encourages, reminds, and corrects false impressions (Ababio & Yamoah, 2016). The results of this study revealed that three out of four participants mentioned that effective advertising strategies are important for retaining existing customers, as well as attracting new customers. In competitive business markets, marketers must find appropriate branding strategies that could guide them to maintain their customers by providing superior customer value (Hilman & Hanaysha, 2015). The analysis of this research showed that the franchise small business leaders noted that developing advertising strategies to focus on the products and services their customers desired was

an essential component for customer retention. In concurrence with Cheney et al. (2015), each participant stated that the traditional advertisements such as signs, newspapers, flyers, and radio commercials are the first choice for increasing the customers' awareness of their products and services. Two participants stated that the organization mail customers flyers and other advertisements. Additionally, two participants stated they use signs such as billboards, as well as telemarketing. Some small business owners indicated the best marketing strategy for their businesses was advertising by increased signage because customers stopped by their stores on impulse, which made the signage more effective than other methods of advertising (Cheney et al., 2015).

Two participants mentioned that the Internet serves as another method for advertising their products and services. An important component in the process of marketing communication is media, which function as bearers and distributors of advertising messages (Krajcovic, 2015). For example, a participant stated that the marketing team sends e-mails and make personal phone calls to customers as a personal communication. The company documents include newspaper advertisement, brochures, flyers, and a card with a website for feedback. However, most Internet advertising is on the corporate website with a link to the local franchise small business.

#### **Theme 4: Networking**

Networking emerged as the fourth theme relating to marketing strategies. Entrepreneurial networks provide benefits such as information and advocacy for promotion (Khedher, 2015). The analysis of this research revealed that the franchise small business leaders agreed that networking and building relationships with members in

the community assist with customer retention. In contrast, Skokic (2015) investigated motivations and benefits of specific entrepreneurial networks and found that some entrepreneurs do not develop strong business ties through networking (Skokic, 2015). For example, a participant at the second franchised small business shared that the state of North Carolina has a teacher of the year program, in which the teacher of the year works with a local business to learn how to align business skills to teaching. Another participant indicated that as a member of the Chamber of Commerce, the leaders have been networking within the community. A third participant stated that the most important factor when you are developing a marketing strategy is to consider the community and location of the business. The brochures, newspaper advertisement, and promotional items provided are used as a networking strategy to attract customers and make them aware of the products and services the franchise small businesses has to offer. Some of the informational brochures and promotional items provided information, such as the brand name, location, telephone number, and website for easy access for networking with customers. Organizational leaders depend on their salespeople to build long-term relationships with the customers for maintaining a competitive advantage (Inyang, 2015).

### **Theme 5: Brand Identity**

The fifth emerging theme was brand identity. Brand identity is important for increasing the awareness of the company because many customers purchase products based on the brand name. Brand identity allows organizations to differentiate their products from competitors (Tabaku & Zerellari, 2015). Three participants agreed that brand awareness has an effect on customer retention because customers focus on the

brand name when selecting a product or service. The informational brochures, newspaper advertisement, and promotional items provided the brand identity of products and services offered to customers. All documents included the franchise small business brand logo. Branding issues are a concern for many organizational leaders because brand equity encompasses customer's attitude toward the intangible features attached to the products through brand name (Hilman & Hanaysha, 2015). Three participants shared that having a positive brand identity is a significant factor to retain customers. One participant gave me a gift bag that the franchise small business leader gives to customers, in which the company name or logo is on each item. For example, the participants shared that being a franchise small business associated with a large corporation assist with building their brands.

Marketing strategies used by business leaders to build a strong brand include one-firm branding, house branding, endorsed branding and separated branding (Musetescu & Chira, 2015). Two participants stated promoting the brand requires minimum efforts because the company is a part of a well-known large corporation with an excellent brand reputation. A new marketing phenomenon is personal branding, which is the marketing effort that a person adopts to promote their personal image in the market (Khedher, 2015). According to one participant, franchise small business leaders must focus on promoting the corporation brand and their franchise brand identity. One-firm branding is the company's strategy to market all their products or services using one brand name, whereas separated branding consists of marketing products or services using a personal brand under the corporate brand (Musetescu & Chira, 2015).



**Theme 6: Loyalty Programs**

Loyalty programs emerged as the sixth theme relating to customer retention strategies. In alignment with the findings of this study, Cheney et al. (2015) found that several business owners used loyalty programs and giveaways as the most common strategies for customer retention. Customer loyalty programs have become an effective incentive for customer retention. Understanding the antecedents of customer loyalty is an important aspect when designing and implementing loyalty programs to retain customers (Tweneboah-Koduah & Farley, 2016).

Two of the franchise small business leaders provided me with a brochure and another with promotional coupons and a promotional card for a free food item regarding the loyalty program and giveaways. The customer loyalty program consists of rewards such as discount pricing, free products, and gifts. Three participants stated their franchise small business offers loyalty programs with a personal touch. For example, one participant shared that the business leaders and staff gave one customer a birthday party. Another participant stated that the franchise small business leaders within the organization volunteer in the community and donate free products for local community events. A third participant expressed that having the spirit to give is the most important strategy for customer retention. The brochure booklets included information on rewards programs offered to customers. The promotional items, promotional coupons, and promotional card provided insight on the kinds of free items franchise small businesses give to their customers. To ensure continued customer loyalty, leaders use organizational service recovery efforts such as some form of compensation and proactive service

behaviors (Inyang, 2015). Therefore, companies incur expenses relating to the promotional allowances and loyalty rewards given to customers for future redemption of goods and services (Gaynor, 2014). Sandada and Matibiri (2015) agreed that customer loyalty, which is a critical competitive tool, can contribute to reduced marketing costs.

### **Porter's Competitive Advantage and Blue Ocean Theory**

The competitive advantage theory (Porter, 1985) and the blue ocean theory (Kim & Mauborgne, 2005) served as the conceptual framework for this study. Most company leaders seek strategies and tools to stabilize the competition, as well as promote organizational growth and enhancement (Teimouri, Fanae, Jenab, Khoury, & Moslehpour, 2016). According to Porter (1985), the business activities that contribute to competitive advantage include the value chain, product design, production, marketing, and support operations. Organizations compete in both the red ocean and the blue ocean, whereas the blue ocean strategy entails the organizational leaders creating new markets with limited competitors (Kim & Mauborgne, 2013). Kim and Mauborgne developed blue ocean strategy that is a systematic approach creating new markets by differentiation and low-cost techniques for the firms to lose competition (Altindag, Cengiz, & Öngel, 2014).

The competitive advantage theory applied to this study because the holistic view of the theory allows franchise small business leaders to explore experiences regarding the development of marketing strategies that ensure the firm's attractiveness in the industry and ultimately creates profit. A company's competitive advantage relates to the unique capabilities of the company to differentiate their products and services from their

competitors (Huang & Chung, 2016). Organizational leaders base their competitive advantage on the available resources and the organization's capabilities such as trust, which is an important competency for sustaining a competitive advantage (Yazdani & Murad, 2015). Strategies for attaining the competitive advantage in the market include organizational goals and objectives, employees, vision, leadership, and stakeholders (Yazdani & Murad, 2015). Organizational leaders have realized that customer retention is an importance element of an increasingly competitive market (Tabaku & Zerellari, 2015). Customer retention is an important factor for company's survival in highly competitive mature markets (Hassouna, Tarhini, Elyas, & AbouTrab, 2015).

Relating to the competitive advantage theory, participants shared information about the marketing strategies used to differentiate their services and products from the local competitors. One classic approach to strategy is gaining competitive advantage through valuable and distinctive resources such as a strong brand or innovative technology (Fréry, Lecocq, & Warnier, 2015). Teimouri, Fanae, Jenab, Khoury, and Moslehpour (2016) asserted that to retain customers and achieve competitive advantage, organizational leaders employ brand personality as a helpful tool. Successful brand building involves identifying the customers' needs, preferences, and personality (Tabaku & Zerellari, 2015). For example, some advantages associated with brand loyalty are increased sales and revenue gains and decreased customer sensitivity towards the competitors' marketing process (Teimouri et al., 2016).

The blue ocean theory relates to findings of this study because franchise small business leaders use marketing strategies to create their untapped market space for

retaining customers. To create a blue ocean, the first stage managers use is looking across alternative industries for reconstructing market boundaries (Altindag et al., 2014). For example, a participant stated that the marketing leaders within the organization do not use the typical marketing triangle, in which many organizational leaders invest a large portion of their resources on national marketing versus local marketing to create a blue ocean strategy.

The business leaders that were interviewed all shared valuable marketing strategies they used to maintain a competitive advantage. These strategies included innovation, signage, social media, community activities, brand identity, loyalty programs, catering to specific markets, customer service, and hiring the right people. For example, one participant catered to parents and their children. The participant has the only restaurant in North Carolina with an indoor play area. In addition, the business leader has a family date night for mothers and sons and fathers and daughters. The organization has a calendar of family events that are available to the public via Facebook. Focusing on the needs of the customer, while providing an inexpensive family outing is how the participant created a blue ocean strategy that gives the organization a competitive advantage over other businesses in the demographic area.

A participant at the first franchise small business maintains a competitive advantage by getting to know the customer. The participant gives customers a gift during their stay. The business leaders make sure long-term stay customers feel at home. The organization gave a long-term guest a birthday party. The competitive advantage of the organization is keeping with the trends to retain customers. The blue ocean strategy is

catering to the customer by making the customer feel special, making the customer feel at home, and making sure they have the necessities that are needed while staying at the establishment, even if it means giving the customer a birthday party. In addition, the organization has a loyalty program, where customers can earn points to use toward free night stays or towards other available products.

Another participant at the second franchise small business believes in brand identity. To stabilize the competition, the organizations' marketing team advertised their brand logo on all marketing material because the leader wants everyone to know the brand. To promote organizational growth, the participant believes in community involvement and giving back to the community. This includes reaching out to targeted customers in the community to make them aware of new products for their families at different intervals of life. The participant gave examples, such as when a customer has a child that graduates from high school, and the parent purchases them a new car or if the parents have a new baby. These events would need some kind of insurance coverage. The participant indicated the key to the organizations success included targeting the right customers, hiring the right people, and providing excellent customer service. The organization has very little employee turnover. The employees that work for the organization all have many years of employment. Another participant believes in catering to the needs of the customer, hiring the right employees, and providing excellent customer service as the means to a successful organization.

All of the participants shared marketing strategies they have used to create a successful competitive advantage over their competition while creating a blue ocean

strategy by the inclusion of product differentiation and strategies that were affordable for their organization. The blue ocean strategy provides business leaders with a different viewpoint to solve problems and diversify organizations' management models (Altindag et al., 2014). The analysis of this research indicated that the franchise small business leaders agreed that developing marketing strategies to focus on the needs of their customers are significant elements for customer retention. One participant stated that leaders and employees try to find out what items the customer needs and special order the item for the customer.

Company managers use the blue ocean strategy to obtain a high-profit ratio in non-competitive markets by meeting their customers' needs (Altindag et al., 2014). Additionally, each franchise small business leader stated that networking in the community provided them with a blue ocean strategy for capturing and retaining customers. Skokic (2015) investigated motivations and benefits of specific entrepreneurial networks. The findings revealed that some entrepreneurs do not develop strong business ties through networking (Skokic, 2015).

### **Applications to Professional Practice**

The study enhances the existing body of information to establish strategies and provide information on how the findings are relevant to improving business practices, which may contribute to the effectiveness of marketing strategies to retain customers at franchised small businesses in North Carolina. The participants that participated in the study were business leaders at franchised small businesses that were 18 years or older in North Carolina with 3 years of marketing strategies experience within the organization

and use retention strategies on a regular basis to retain customers. The success of the four participating franchised small businesses stemmed from the implementation of excellent marketing strategies and advertising strategies by the business leaders. The results of this study indicated that 100% of the participants indicated the importance of marketing strategies in the operation and profitability of a company. Organizations' marketing strategy should include their mission statement, which defines the key element of the competitive area of its operation (Lotayif, 2016).

More specifically, the participants reflected the components of the competitive advantage theory and blue ocean theory throughout their responses. Huang & Chung (2016) indicated that corporate rewards come from a sustained competitive advantage and properly used corporate resources and capabilities. Furthermore, business leaders that have higher-value resources such as employees, technology, reputation, and partnerships and manage their resources portfolio properly benefit from a competitive advantage (Fréry et al., 2015). The company managers can build blue ocean strategy for future success by avoiding uncertainties in the competitive market (Altindag et al., 2014). The knowledge other franchised businesses may gain from this study is the importance of marketing strategies that includes networking within the community, targeting specific market segments, advertising, promoting brand identity, developing customer loyalty programs and providing personalized customer service. According to Al-Nimer, Qasem, AlAdham, & Yousef (2015), the two fundamental factors in the deployment of a company's name are marketing and advertising.

Relating to the responses of the franchise small business leaders, they expressed that advertisements and brand identity were effective marketing strategies. A participant believed that brand identity in conjunction with advertising was a major marketing strategy. Hanaysha and Hilman (2015) found that advertising had significant positive effects on brand loyalty, brand image, and brand awareness. Therefore, business leaders may incorporate brand identity when developing advertisements to increase customers' awareness of the product or service by brand. To conquer the consumer's loyalty, marketing leaders must develop bold and innovative advertising campaigns (Musetescu & Chira, 2015).

The results and documentation revealed that customer retention is a key factor in franchise small business profitability. All the participants indicated that business leaders need marketing strategies including networking with other businesses and community involvement to be successful at customer retention. The basis of relationship marketing is the indication that selling a product to an existing customer is cheaper than selling the same product to a new one; therefore, business leaders focus on increasing customer retention to increase profitability (Abdolvand, Baradaran & Albadvi, 2015; Hassouna et al., 2015).

The most efficient marketing strategy for customer retention mentioned in the franchise small business leaders' responses was the development of customer loyalty programs. Developing loyalty programs help sustains and enact repeat purchases while increasing communication between businesses and customers (Pimpão, Correia, Duque, & Carlos Zorrinho, 2014). Business leaders may focus on developing customer loyalty



programs to enhance customer satisfaction and build strong customer-business organization relationships. A participant indicated that building relationships with loyal customers and staying in contact with them was a major marketing strategy. Customer loyalty is a source of a sustainable competitive advantage because loyal customers are a continuing source of profit for the business (Trif, 2013).

### **Implications for Social Change**

The implications for social change on marketing strategies may provide insight into the significance of effective marketing approaches to promote excellent customer service. The quality of rendered services not only enhances customer satisfaction but leads to customer retention (Al-Tit, 2015). The survival of businesses is dependent on customer retention.

The findings on brand identity may provide business leaders with an understanding of the significance of developing a positive brand image aligned with the customer's personality, thus increasing customer satisfaction. Brand equity is a valuable intangible asset that can provide companies with a competitive advantage (Hanaysha & Hilman, 2015). When creating a strong brand, some leaders consider a communication model composed of ignite, inform, and involve (Musetescu & Chira, 2015). Some benefits of high standards of service quality include sustainable demand from satisfied consumers and a positive image in the market (Wongleedee, 2016). Wu (2015) stated that consumers' attitude towards brand image has a positive influence on purchase intention.

Relating to the findings on customer retention may contribute to positive social change because the retention of customers assists with building positive customer-business relationships within the community. Salespeople adopt relationship selling approaches such as following up with customers after the initial sale to better meet customers' needs, as well as building and maintaining relationships with customers (Inyang, 2015). The information on marketing strategies and customer retention may further highlight the importance of understanding how customer retention benefits all stakeholders through increase job opportunities and a stable positive economy.

### **Recommendations for Action**

Franchised small business leaders focus on attracting new customers while retaining loyal customers, which increases profit. The targeted audience, which should pay attention to the study, includes franchised small business leaders, community leaders, and stakeholders, who may gain knowledge from these findings that may add substance and sustainability to the long-term success of franchised small businesses. To disseminate the findings of this study to a larger audience, I would publish a summary in a local magazine. Additionally, I would share the information with other small business leaders in North Carolina. As an alumnus of the local college, I would contact the marketing department to share my research with other marketing students who are pursuing their graduate degrees. Five recommended steps for action identified from the study are as follows: (a) develop effective marketing and advertising strategies, (b) provide excellent customer service, (c) understand the value of customers, (d) network within the business sector, and (e) build relationships within the community.

The first recommendation is for franchise small business leaders to combine effective marketing and advertising strategies such as signage and the Internet to make the customer familiar with the brand. The most important elements of any value chain are marketing channels (Watson, Worm, Palmatier, & Ganesan, 2015). The participants provided scenarios of different marketing strategies they have implemented to retain customers. One participant in this study indicated the use of advertising strategies such as signage to make the customer familiar with the brand. Customers buy the products they see in advertisements; therefore, marketing leaders employ media planning strategies to find the suitable timeframe and run the advertisement campaign to increase the sales of our products (Krajcovic, 2015).

A major objective of franchised small businesses is offering outstanding customer service, which is the second recommendation. The results of this study showed that all the franchise small business leaders focused on providing excellent customer service to retain customers. Al-Tit (2015) examined the relationship between service and customer satisfaction, as well as the relationship between service quality and customer retention. Al-Tit found that customer satisfaction has a positive influence on customer retention. Rashid, Rani, Yusuf, and Shaari (2015) found that service quality and customer satisfaction had a significant relationship to customer's loyalty.

The third recommendation is that business leaders should remember to retain customers they must understand the value of customer loyalty. Rashid, Rani, Yusuf, and Shaari (2015) described customer loyalty as an important element for gaining competitive advantage. Two of the franchise small business leaders provided brochures

regarding the organizations' customer loyalty program and one participant provided promotional coupons and a promotional card. According to two participants, members of the customer loyalty programs tend to refer new customers to the business. Sandada and Matibiri (2015) focused on the mediating effect of passenger satisfaction on the relationship between loyalty programs and passenger loyalty. Sandada and Matibiri revealed that customer satisfaction leads to customer loyalty. Additionally, loyalty programs have a positive effect on customer satisfaction (Sandada & Matibiri, 2015). Mafini and Dhurup (2015) examined the structural relationship between store image factors, store satisfaction, and customer loyalty. According to Mafini and Dhurup, salesperson assistance emerged as the most important factor to consumers and store satisfaction emerged as a predictor of customer loyalty.

The fourth recommendation from this study is that franchise small business leaders should network with other franchised small business leaders to share knowledge of the benefits of investing into marketing strategies that provide brand identity to the public. Establishing a network and having a relationship with influential people provides entry into social networks that are normally inaccessible through formal communications (Khedher, 2015). Two participants stated networking with other businesses in the community provides new avenues for brand identity and reaching the target market. Skokic and Morrison (2015) suggested that entrepreneurs do not establish strong personal and firm-to-firm ties, but focus on the development of entrepreneurial networks.

The last recommendation is for franchise small business leaders to build relationships within the community. According to Siddiquei, Awan, Asghar, Ghafoor,

and Abrar (2015), relationship marketing and investment has a positive impact on the perception of customer-retailer relationship and their outcomes. Participants indicated that businesses have to sometimes spend money and participate in community events to gain the trust of customers. Building a sustainable relationship with customers has become paramount because consumers have unlimited choices of service providers (Bolton & Mattila, 2015).

### **Recommendations for Further Research**

One limitation in this qualitative multiple case study was the sample size of participants, which consisted of franchise small business leaders 18 years or older with 3 years of marketing strategy experience within the organization and use retention strategies on a regular basis to retain customers that represent the general population of franchise small business leaders in North Carolina. Because the components of marketing and customer retention are broad, conducting further studies on customer service and customer retention might provide leaders with additional resources to increase organizational profitability. Opportunities for further research may include expanding the scope to include a larger geographical area. Expanding the demographics of location may increase the number of participants. A recommendation for further study is to expand the business to include all small business leaders in the area. The recommendation for further research may also include doing a quantitative study on franchised small businesses. The contributions of a quantitative study may provide further insight on marketing strategies used by franchised small businesses to retain customers and customer retention success. A quantitative study may allow for a larger population, which may allow generalizations

to the larger population. To strengthen the use of a single methodology either qualitative or quantitative methods, future researchers could employ the mixed method approach.

### **Reflections**

The purpose of this qualitative multiple case study was to explore the marketing strategies that franchise small business leaders use to retain customers. As a customer to many franchise small businesses in North Carolina, I gained insight of the significance of customer satisfaction and excellent customer service to each participant. The results of the study indicated the marketing strategies that the four individual franchised small businesses had in common with trying to retain customers.

I conducted this qualitative multiple case study following the data collection technique outlined in Section 2, which allowed me to gain knowledge on marketing in a comfortable setting and about which factors are relevant for customer retention. My first concern was the recruitment of a sufficient sample size to ensure data saturation because some business leaders were reluctant to grant permission for me to conduct my research in their organizations. For example, one franchised small business decided to withdraw from the study because of internal management changes. However, the participants were eager to participate in the study, and they responded openly without reservation. All the participants were very knowledgeable that the concept of retaining customer's increases profitability. The franchise small business leaders understood the concept of developing marketing and advertising strategies, building a positive brand identity, and retaining customers through customer loyalty programs, networking, market segmentation, and personalization of customer service. I am very appreciative of the participants and the

time allotted for me to share their experiences regarding marketing strategies used to retain customers for their franchised small business.

The most important lesson for me as a researcher was that conducting qualitative research studies require spending extensive time communicating with the participants and analyzing data. I conducted the interviews by following an interview protocol to make sure all the interviews were consistent and that all participants provided a response to each question. I took electronic notes to support the recorded interview for accuracy.

Reflecting on the data collection and analysis process, I would have allotted more time for transcribing, coding, and theming the interviews. I introduced myself to all but one participant face-to-face informally and discussed my proposed study. One participant schedule did not permit a meeting with me. Therefore, I was allowed to introduce myself and discuss my proposed study by phone. In addition, interviews were scheduled quickly once I made contact with the participant. Therefore, the time previously allotted for sending an e-mail with the scheduled date and time was shorter than one week. Three interviews were held on the premises of the franchise small businesses and one interview was held at a public location per the request of the participant.

### **Summary and Study Conclusions**

The importance of marketing strategies to franchised small businesses is essential to growth and profitability of the organization. Marketing strategies allow business leaders the competitive advantage over their competition when they use proper strategies such as advertising strategies, brand identity, and customer retention strategies to retain

loyal customers for the success of the business. Business leaders know that customer retention is a fundamental aspect to an organization's success.

The purpose of this qualitative multiple case study was to explore what marketing strategies franchised small businesses use to retain customers in North Carolina. The findings revealed franchised small business owners are using marketing strategies to retain customers. The six themes that emerged from the study are (a) personalization of customer service, (b) market segmentation, (c) innovative advertising, (d) networking, (e) brand identity, and (f) loyalty programs. All four participants agreed that community involvement, hiring the right people to work for the business, customer service, brand awareness, product differentiation, customer loyalty, networking, building relationships, and loyalty programs are beneficial strategies for increasing profitability. Business leaders have to be creative in their quest to retain customers. The findings in this study indicated the importance of keeping abreast of the trends and being innovative is essential to retaining customers.

In conclusion, the multiple case study provided an approach to capture knowledge from franchise small business leaders about their marketing strategies to retain customers. The consensus among the participating leaders was that effective marketing strategies are the lifeline to customer retention. Franchised small business leaders should include marketing strategies in their vision of growth if they are planning to retain customers and increase profit. The findings can be beneficial to all franchised small businesses that are willing to invest in the growth, sustainability, and success of their organization. In



addition, future studies focusing on franchise small businesses might create knowledge to assist other small business leaders.

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## Appendix A: Correspondence Letter to Franchise Small Business Leaders

Dear (Insert Name),

My name is Hilda Arline. I am completing a qualitative multiple case study on the marketing strategies for retaining customers in order to complete my Doctor of Business Administration degree. The primary focus of my research is to explore what marketing strategies do some franchise small business leaders use for retaining customers.

The contribution of the study to social change might be a bridge the gap between the lack of data on the factors that influence customers' decision to remain loyal customers and purchase the franchise small business' products or services, which may contribute to economic reform in the United States.

If further information is required, please contact me at (insert phone number) or email [hilda.arline@waldenu.edu](mailto:hilda.arline@waldenu.edu). Please reply to this email granting permission to conduct my research study with franchise small business leaders from your business. Thank you in advance for your cooperation.

Sincerely,  
Hilda Arline  
Doctoral Business Administration-Student

## Appendix B: Invitation for Participation

Dear Small Business Leader(s)

My name is Hilda Arline. I am completing a qualitative multiple case study on the marketing strategies for retaining customers in order to complete my Doctor of Business Administration degree. The primary focus of my research is to explore what marketing strategies do some franchise small business leaders use for retaining customers.

As a franchise small business leader who may have experience related to the purpose of this study, I would like to invite you to participate in this study and affirm your consent to participate in a face-to-face interview and follow-up interview. You will answer eight interview questions regarding marketing strategies that franchise small business leaders use to retain customers. Please contact me with any questions by email [hilda.arline@waldenu.edu](mailto:hilda.arline@waldenu.edu) if you decide to participate in this study. Participation is voluntary and will be confidential.

The findings of this research study about the marketing strategies to retain customers may identify opportunities for improving marketing strategies. Thank you for your consideration and cooperation in advance.

Sincerely,

Hilda Arline  
Doctoral Business Administration-Student

## Appendix C: Consent Form

### Consent Form

You are invited to take part in a research study of marketing strategies to retain customers. The researcher is inviting business leaders employed at a franchise small business in North Carolina to participate in this study. You meet the following selection criteria: (a) a small business leaders, (b) 18 years or older, and (c) with at least 3 years of marketing strategy experience within the organization, and (d) use retention strategies on a regular basis to retain customers. This form is part of a process called “informed consent” to allow you to understand this study before deciding whether to take part.

This study is being conducted by a researcher named Hilda Arline, who is a doctoral student at Walden University.

#### **Background Information:**

The purpose of this study is to explore the marketing strategies franchise small business leaders use for retaining customers.

#### **Procedures:**

If you agree to be in this study, you will be asked to:

- Participate in a face-to-face interview at a private, comfortable, and convenient location for you. The interview will be approximately 30 minutes to 1 hour. The interview will be audio recorded to ensure accuracy.
- Participate in a face-to-face follow-up interview for 30 minutes to 1 hour.
- You will be contacted to review the transcription of the interview to discuss the summary of my interpretations of your interview responses, which should take less than 5 minutes.
- You will be able to withdraw from participation in the study via verbal communication or email without penalty or bias before data analysis.

Here are some sample questions:

1. What strategies have you developed to marketing your services or products?
2. What are different aspects of your product or services do you consider when develop marketing strategies?
3. How have you improved your marketing strategies to differentiate your services or products?

#### **Voluntary Nature of the Study:**

This study is voluntary. Everyone will respect your decision of whether or not you choose to be in the study. No one at \_\_\_\_ will treat you differently if you decide not to be in the study. If you decide to join the study now, you can still change your mind later. You may stop at any time.

**Risks and Benefits of Being in the Study:**

Being in this type of study involves some risk of the minor discomforts that can be encountered in daily life, such as embarrassment, stress, or frustration. Being in this study would not pose a risk to your safety or wellbeing. Your participation will be beneficial with identifying opportunities to improve marketing strategies franchise small business leaders can develop for retaining customers and increase the business' sustainability. The benefits of your participation may provide you with a sense of high self-esteem, knowing that you could contribute to helping improve your own and other business owners understanding of marketing strategies franchise small business leaders can develop for retaining customers.

**Payment:**

There will be no compensation or payment for participation in this study.

**Privacy:**

Any information you provide will be kept confidential. The researcher will not use your personal information for any purposes outside of this research project. Also, the researcher will not include your name or anything else that could identify you in the study reports. Data will be kept secure by security password protected storage media in a locked safe. Data will be kept for a period of at least 5 years as required by the university.

**Contacts and Questions:**

You may ask any questions you have now, or if you have questions later, you may contact the researcher via [hilda.arline@waldenu.edu](mailto:hilda.arline@waldenu.edu). If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. She is the Walden University representative who can discuss this with you. Her phone number is [REDACTED]. Walden University's approval number for this study is **IRB will enter approval number here**, and it expires on **IRB will enter the expiration date**.

The researcher will give you a copy of this form to keep.

**Statement of Consent:**

I have read the above information and I feel I understand the study well enough to make a decision about my involvement. By signing this consent form, I understand that I am agreeing to the terms described above and meet the following criteria: (a) franchise small business leader in North Carolina, and (b) age 18 or older, and (c) with 3 years of marketing strategy experience within the organization, and (d) use retention strategies on a regular basis to retain customers.

Printed Name of Participant

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Date of consent

---

Participant's Signature

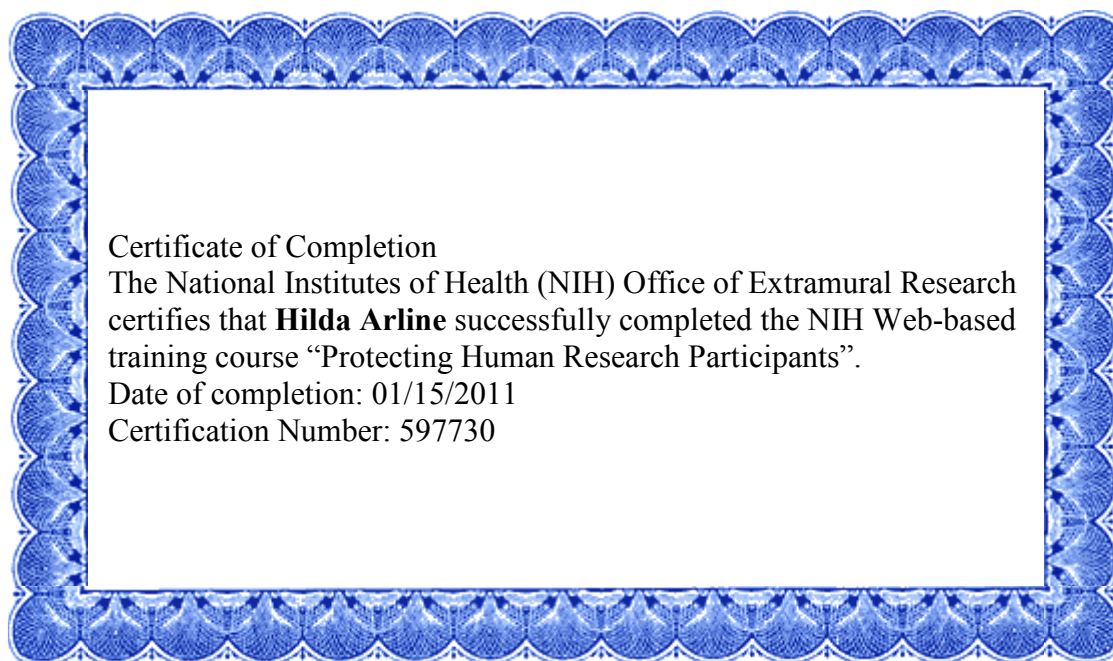
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Researcher's Signature

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## Appendix D: Certification of Ethical Measures



## Appendix E: Interview Protocol

Business:

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Interviewee:

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Interviewer:

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Documents Obtained:

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### Introduction

You have been selected to speak with me today because you have been identified as someone who has a great deal to share about marketing strategies used by the organization in which you work. My research project as a whole focuses on marketing strategies that franchise small business leader's use for retaining customers. The aim of this study is find out what marketing strategies has helped your organization be successful at retaining customers. I hope that the information collected from this interview will help other franchise small businesses improve their marketing strategies practice and retain customers.

### Introductory Protocol

To facilitate my note taking, I would like to record our conversations today. I will be the only person with access to the recording, which will be destroyed after five years along with all documents. In addition, you must sign a consent form to meet our human subject requirements. Essentially, this document states that: (1) all information will be held confidential, (2) your participation is voluntary and you may stop at any time if you feel uncomfortable, and (3) we do not intend to inflict any harm. I have planned this interview to last no longer than one hour. Thank you for your agreeing to participate.

## Interview Questions

Participants will answer the following semistructured interview questions:

1. What strategies have you developed to marketing your services or products?
2. What are different aspects of your product or services do you consider when developing marketing strategies?
3. How have you improved your marketing strategies to differentiate your services or products?
4. What marketing strategies have you used for retaining customers?
5. How has the marketing strategies affected the retention of customers?
6. What are some marketing strategies you use to position and promote brand identity?
7. What are the marketing strategies would you implemented to ensure a competitive advantage in the local and global market?
8. What marketing strategies would you suggest that small business leaders use to retain customers?



### Appendix F: Interview Questions

Participants will answer the following semistructured interview questions:

1. What strategies have you developed to marketing your services or products?
2. What are different aspects of your product or services do you consider when developing marketing strategies?
3. How have you improved your marketing strategies to differentiate your services or products?
4. What marketing strategies have you used for retaining customers?
5. How has the marketing strategies affected the retention of customers?
6. What are some marketing strategies you use to position and promote brand identity?
7. What are the marketing strategies would you implemented to ensure a competitive advantage in the local and global market?
8. What marketing strategies would you suggest that small business leaders use to retain customers?

## Appendix G: Title of Appendix Pilot Study Invitation for Participation

Dear Small Business Leader(s)

My name is Hilda Arline. I am completing a qualitative multiple case study on the marketing strategies for retaining customers in order to complete my Doctor of Business Administration degree. The primary focus of my research is to explore what marketing strategies do some franchise small business leaders use for retaining customers.

As a franchise small business leader who may have experience related to the purpose of this study, I would like to invite you to participate in this pilot study and affirm your consent to participate in a face-to-face interview and follow-up interview. You will answer eight interview questions regarding marketing strategies that franchise small business leaders use to retain customers. Please contact me with any questions by email [hilda.arline@waldenu.edu](mailto:hilda.arline@waldenu.edu) if you decide to participate in this study. Participation is voluntary and will be confidential.

The findings of this research study about the marketing strategies to retain customers may identify opportunities for improving marketing strategies. Thank you for your consideration and cooperation in advance.

Sincerely,

Hilda Arline  
Doctoral Business Administration-Student

## Appendix H: Pilot Study Consent Form

You are invited to take part in a research study of marketing strategies to retain customers. The researcher is inviting business leaders employed at a franchise small business in North Carolina to participate in this study. You meet the following selection criteria: (a) a small business leaders, (b) 18 years or older, and (c) with at least 3 years of marketing strategy experience within the organization, and (d) use retention strategies on a regular basis to retain customers. This form is part of a process called “informed consent” to allow you to understand this study before deciding whether to take part.

This study is being conducted by a researcher named Hilda Arline, who is a doctoral student at Walden University.

### **Background Information:**

The purpose of this study is to explore the marketing strategies franchise small business leaders use for retaining customers.

### **Procedures:**

If you agree to be in this study, you will be asked to:

- Participate in the pilot study process.
- Participate in a face-to-face interview at a private, comfortable, and convenient location for you. The interview will be approximately 30 minutes to 1 hour. The interview will be audio recorded to ensure accuracy.
- Participate in a face-to-face follow-up interview for 30 minutes to 1 hour.
- You will be contacted to review the transcription of the interview to discuss the summary of my interpretations of your interview responses, which should take less than 5 minutes.
- You will be able to withdraw from participation in the study via verbal communication or email without penalty or bias before data analysis.

Here are some sample questions:

4. What strategies have you developed to marketing your services or products?
5. What are different aspects of your product or services do you consider when develop marketing strategies?
6. How have you improved your marketing strategies to differentiate your services or products?

### **Voluntary Nature of the Study:**

This study is voluntary. Everyone will respect your decision of whether or not you choose to be in the study. No one at \_\_\_\_ will treat you differently if you decide not to be in the study. If you decide to join the study now, you can still change your mind later. You may stop at any time.

### **Risks and Benefits of Being in the Study:**

Being in this type of study involves some risk of the minor discomforts that can be encountered in daily life, such as embarrassment, stress, or frustration. Being in this study would not pose a risk to your safety or wellbeing. Your participation will be beneficial with identifying opportunities to improve marketing strategies franchise small business leaders can develop for retaining customers and increase the business' sustainability. The benefits of your participation may provide you with a sense of high self-esteem, knowing that you could contribute to helping improve your own and other business owners understanding of marketing strategies franchise small business leaders can develop for retaining customers.

**Payment:**

There will be no compensation or payment for participation in this study.

**Privacy:**

Any information you provide will be kept confidential. The researcher will not use your personal information for any purposes outside of this research project. Also, the researcher will not include your name or anything else that could identify you in the study reports. Data will be kept secure by security password protected storage media in a locked safe. Data will be kept for a period of at least 5 years as required by the university.

**Contacts and Questions:**

You may ask any questions you have now, or if you have questions later, you may contact the researcher via [hilda.arline@waldenu.edu](mailto:hilda.arline@waldenu.edu). If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. She is the Walden University representative who can discuss this with you. Her phone number is [REDACTED]. Walden University's approval number for this study is **IRB will enter approval number here**, and it expires on **IRB will enter the expiration date**.

The researcher will give you a copy of this form to keep.

**Statement of Consent:**

I have read the above information and I feel I understand the study well enough to make a decision about my involvement. By signing this consent form, I understand that I am agreeing to the terms described above and meet the following criteria: (a) franchise small business leader in North Carolina, and (b) age 18 or older, and (c) with 3 years of marketing strategy experience within the organization, and (d) use retention strategies on a regular basis to retain customers.

Printed Name of Participant

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Date of consent

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Participant's Signature

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Researcher's Signature

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### Appendix I: Pilot Study Interview Questions

For the pilot study, participants will answer the following semistructured interview questions:

1. What strategies have you developed to marketing your services or products?
2. What are different aspects of your product or services do you consider when developing marketing strategies?
3. How have you improved your marketing strategies to differentiate your services or products?
4. What marketing strategies have you used for retaining customers?
5. How has the marketing strategies affected the retention of customers?
6. What are some marketing strategies you use to position and promote brand identity?
7. What are the marketing strategies would you implemented to ensure a competitive advantage in the local and global market?
8. What marketing strategies would you suggest that small business leaders use to retain customers?