

2018

# Customer Relationship Management in the E-Retailing Environment

Nikki R. Hicks  
*Walden University*

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# Walden University

College of Management and Technology

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Nikki Hicks

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## Review Committee

Dr. Jaime Klein, Committee Chairperson, Doctor of Business Administration Faculty

Dr. Jamiel Vadell, Committee Member, Doctor of Business Administration Faculty

Dr. Julia East, University Reviewer, Doctor of Business Administration Faculty

Chief Academic Officer  
Eric Riedel, Ph.D.

Walden University  
2018

Abstract

Customer Relationship Management in the E-Retailing Environment

by

Nikki R. Hicks

MBA, Averett University, 2006

BS, Hampton University, 1994

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

January 2018

## Abstract

Small business enterprise (SBE) managers often lack resources, expertise, and impact when selling in an online environment. SBEs can overcome increased competition by adopting customer relationship management (CRM) into their business model for survival and longevity. Using the conceptual framework technology, organization, environment (TOE), this multiple case study explored effective marketing strategies that small store retail managers use to successfully sell apparel and accessories in online markets. The study population included leaders from independent small online retail enterprises with brick-and-mortar stores located in the Central, Tri-Cities, or Southside areas in Virginia. The data collection process included semistructured, on-site interviews of 4 SBE owners or managers and reviewing organizational documents and online postings from those 4 organizations. Using topic coding, the data were organized into nodes grounded in the context of TOE. The thematic analysis yielded 5 themes: social media engagement, price congruency, organizational knowledge benefit, customer satisfaction, and customer engagement. The study findings revealed that a significant strategy for SBEs operating in online markets was social CRM, an inexpensive and critical tool for CRM. Further, CRM tools such as social media required consistent monitoring and the devotion of financial and human resources to deliver constant customer engagement. The implication for social change includes the potential to improve the life cycle of SBEs in smaller communities, which improves community entrepreneurial and startup success. Entrepreneurship contributes to community vitality and economic prosperity by providing employment, skill development, and job training.

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## Dedication

This long-awaited completion of a project I started when my daughter was 3 years old (she is now 9) is dedicated to my husband, daughter, parents, brother, in-laws, church family, family, and all of those who supported me along the way.

## Acknowledgments

I thank God for instilling in me a heart of determination and perseverance. I am where I am today because of His grace and mercy. I want to thank my family for their unwavering support. My husband, who at the same time was completing his doctorate, supported me throughout and evolved into the mentor I would need at the end. I thank my daughter for allowing her mommy to be consumed with homework and papers; I hope my love for research rubs off on her. I thank my father for pushing me when I wanted to give up. I thank my mother for always offering words of encouragement. I also thank my brother for inspiring me to be that big sister he could always look up to. Posthumously, I thank my father-in-law and mother-in-law for inspiring me to be an educator. It was their love for education that led me to this career and desire to pursue my doctorate. I truly appreciate the best doctoral study committee I could have hoped for. Thank you Dr. Klein, your perspective on how to get through this process was invaluable. Thank you Dr. Vadell for your feedback and patience. Finally, Dr. East, I truly appreciate the feedback. To my doctoral study committee, your guidance made me a better researcher and writer.

## Table of Contents

List of Tables .....	iv
List of Figures .....	v
Section 1: Foundation of the Study.....	1
Background of the Problem .....	1
Problem Statement .....	2
Purpose Statement.....	2
Nature of the Study .....	3
Research Question .....	4
Interview Questions .....	5
Conceptual Framework.....	5
Operational Definitions.....	6
Assumptions, Limitations, and Delimitations.....	7
Assumptions.....	7
Limitations .....	8
Delimitations.....	9
Significance of the Study .....	9
Contribution to Business Practice .....	10
Implications for Social Change.....	10
Review of Professional and Academic Literature .....	12
TOE Framework .....	13
SBEs .....	31



Relationship Marketing and CRM.....	35
Summary and Transition.....	44
Section 2: The Project.....	45
Introduction.....	45
Purpose Statement.....	45
Role of the Researcher .....	46
Participants.....	50
Research Method and Design .....	55
Research Method .....	55
Research Design.....	57
Population and Sampling .....	61
Ethical Research.....	65
Data Collection Instruments .....	67
Data Collection Technique .....	69
Data Organization Technique .....	73
Data Analysis .....	75
Reliability and Validity.....	77
Reliability.....	77
Validity .....	77
Transition and Summary.....	81
Section 3: Application to Professional Practice and Implications for Change .....	82
Introduction.....	82

Presentation of the Findings.....	83
Theme 1: Price Congruency.....	86
Theme 2: Organizational Knowledge Benefit .....	90
Theme 3: Customer Satisfaction.....	95
Theme 4: Customer Engagement.....	100
Theme 5: Social Media Engagement .....	104
Applications to Professional Practice .....	113
Implications for Social Change.....	119
Recommendations for Action .....	120
Recommendations for Further Research.....	125
Reflections .....	126
Conclusion .....	127
References.....	129
Appendix A: Interview Protocol.....	153
Appendix B: Interview Questions.....	155
Appendix C: Invite Correspondence Letter to Participants .....	156
Appendix D: Follow-Up E-mail Thank-You and Interview Summary .....	157
Appendix E: Study Participant Response Record.....	158
Appendix F: McLean and DeLone Prescreen Checklist.....	160

## List of Tables

Table 1. Summary of EC Adoption in SME Context and TOE Framework .....	31
Table 2. Marketing Strategies Success Summary .....	52
Table 3. Coding of Participants' Response Related to Data Analytics.....	93
Table 4. Overview of CRM Tools Used .....	102
Table 5. Coding of Participants' Response Related to SCRM .....	106
Table 6. GDP by Retail Sector by Region .....	123
Table 7. GDP by Retail Sector by State.....	124

## List of Figures

Figure 1. Coded node responses TOE framework .....	85
Figure 2. SBE organizational context emergent themes .....	87
Figure 3. SBE environmental context emergent themes.....	96
Figure 4. SBE technological context emergent themes .....	104

## Section 1: Foundation of the Study

### **Background of the Problem**

Estimates indicated online retail sales, which reached \$298 billion in 2014 and \$341 billion in 2015, would reach \$395 billion in 2016, representing a 15% increase over 2015 (U.S. Department of Commerce, 2016, 2017). The convenience of online shopping and instances of better pricing have driven the growth of online retailing (Akbar & James, 2014). Harrigan and Miles (2014) explained that small business enterprise (SBE) managers often lack resources, expertise, and impact when selling in an online environment. In addition, small online retail managers lack the ability to connect with consumers and build lasting relationships (Verma, Sharma, & Sheth, 2015).

The focus for online retail managers has shifted from satisfying the needs of bargain shoppers to establishing long-term relationships (Ayanso & Lertwachara, 2015). Fostering and nurturing a customer relationship builds brand equity and brand trust (Armstrong & Kotler, 2015). Verma et al. (2015) asserted that although there is literature on relationship marketing in the *business-to-business* (B2B) and *business-to-consumer* (B2C) context, the research on relationship marketing in the online context has remained fragmented. Berry (2002), who devised the term *relationship marketing*, explained that a firm's marketing activities scope must go beyond attracting new customers to retaining and building relationships with existing customers. Customer relationship management (CRM), which is the crux of relationship marketing, is critical to e-commerce (EC) (Verma et al., 2015). For the current study, I focused on an applied business problem in the context of marketing and EC for the small business retail manager. Managing

customer services and fostering relationships is the most crucial obstacle for online retail managers (Ayanso & Lertwachara, 2015). Small retail owners are searching for methods to build relationships in an online domain that are different from the brick-and-mortar or in-store experience (Verma et al., 2015).

### **Problem Statement**

Online retailing is a crucial business practice for small enterprises to remain competitive (Ghandour, 2015). Between 2014 and 2015, EC for U.S. retailers grew 14.4 % to \$341 billion in sales, from \$298 billion in 2014, with clothing and clothing accessories representing the largest retail merchandise category for EC (U.S. Department of Commerce, 2016). The general business problem was that SBE managers who fail to implement strategies to sell in online markets are at risk of reduced profit and market share. The specific business problem was that some small store retail managers lack effective marketing strategies to successfully sell apparel and accessories in online markets.

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore effective marketing strategies that small store retail managers use to successfully sell apparel and accessories in online markets. The population for the research study included leaders from four independent small retail enterprises with either a physical location in the Central, Tri-Cities, or Southside areas in Virginia as well as selling in an online environment. These leaders have implemented strategies to successfully sell apparel and accessories in online markets. In 2014, Tri-Cities Virginia was below the state average

for new business startups, and the Southside area had the highest rate, 20.3%, of families living at or below the poverty line (Council on Virginia's Future, 2017). The implication for positive social change in this study included the potential to assist small to medium enterprises (SMEs) in Central, Tri-cities, and Southside areas of Virginia with a strategy for long-term business stability to help break the cycle of poverty. Alvarez and Barney (2014) explained that entrepreneurship helps break the cycle of poverty in communities by providing employment, skill development, and job training, which improve the opportunity for employment and can reduce unemployment in those communities.

### **Nature of the Study**

I used a qualitative method for this study. Schutt (2015) explained that the qualitative research method is ideal for exploratory, descriptive, and evaluative studies. The purpose of this research was to explore marketing strategies. Therefore, a qualitative study, which facilitates inductive reasoning and analysis of the subject phenomenon, was appropriate. A researcher conducting a quantitative study uses the quantitative method because it is ideal for explanatory studies and statistical analysis (Schutt, 2015). The mixed method researcher analyzes from multiple perspectives and attempts to provide complementary views or expansion of a previous theory (Venkatesh, Brown, & Sullivan, 2016). The quantitative method was inappropriate for this study because I sought to explore and gain insights through inquiry as opposed to standardized statistical analysis. Furthermore, the mixed method approach was inappropriate for this study because I did not need a quantitative analysis component.

I used a multiple case study design for this study. Petty, Thomson, and Stew (2012) detailed types of research designs for qualitative research including case study, phenomenology, ethnography, and narrative. A multiple case study design was appropriate because the primary focus of this study was to explore organizations utilizing successful marketing strategies for ordinary business functions. A researcher will use a multiple case study research design to explore organizations through information gathering and analysis of individuals, institutions, or systems (Petty et al., 2012). Alternatively, researchers will employ a phenomenological design when seeking to analyze lived experiences and understand unique experiences through interpretation and explanation (Petty et al., 2012). Schutt (2015) explained that ethnography is a design whereby the researcher studies culture in a participatory method in anthropological and sociological studies. For this study, collecting information about marketing strategies did not require participating in day-to-day operations with the firm as prescribed in the ethnography design, or interpreting a phenomenon as exercised in a phenomenological study. Petty et al. described narrative research as a biographical narrative focused on individual or small group experiences. The nature of this study did not require a chronological list of events, oral history, or personal reflections; the focus was thematic analysis to illuminate marketing strategies.

### **Research Question**

What effective marketing strategies do small store retail managers use to successfully sell apparel and accessories in online markets?



### **Interview Questions**

1. How would you describe your target market for both your physical location and online website?
2. What marketing strategies have you used for both the goods and services you market to your target customers online?
3. What strategies do you use to establish and maintain relationships with your target customers in store and online?
4. What are your pricing strategies for the online store and the physical store?
5. What promotional strategies do you use for marketing to online customers?
6. What social media sites do you use to reach your target market?
7. What strategies do you use to reach online customers?
8. How do you measure the effectiveness or success of your marketing strategies?
9. Please share any additional information about marketing strategies for your store that were not covered.

### **Conceptual Framework**

The technology, organization, environment (TOE) framework, an adoption theory used to explain the propensity of organizations to adopt technology, was the conceptual framework for this study. TOE, first introduced by Tornatzky and Fleischer (1990), is a set of factors used to forecast the probability of technology adoption by analyzing the organizational, environmental, and technological conditions that operate as antecedents to technology adoption. The organizational conditions include the firm's business scope, top

management support, organizational culture, human resource (HR) quality, size, and resources (Awa, Ojiabo, & Emecheta, 2015). Environmental conditions include competitive pressure, consumer readiness, and regulatory environment, while technological conditions comprise technology infrastructure, employee technical skills, and perceived risks (Baker, 2012; Chatzoglou & Chatzoudes, 2016; Tornatzky & Fleischer, 1990).

CRM is significant to the competitive advantage for SMEs (Harrigan & Miles, 2014). Further, the adoption of technology as a business model, such as EC, is a significant CRM enabler (Harrigan, Soutar, Choudhury, & Lowe, 2014). Verma et al. (2015) highlighted that a primary issue among online retail marketing managers was the inability to connect with consumers. Using the TOE framework to explore the antecedents to EC adoption among SMEs, which is a significant factor for CRM processes, underscores key organizational characterizations that act as a precursor to technology adoption. TOE conveys a suitable model for in-depth analysis of the internal and external capabilities of an organization. This framework was appropriate for this study of marketing strategies that supported CRM activity to improve competitive advantage and to foster long-term consumer relationships.

### **Operational Definitions**

*Customer relationship management (CRM):* CRM is a set of marketing principles and processes instituted to attract new customers and retain current customers through relationship management (Choudhury & Harrigan, 2014).

*Electronic business (e-business)*: Electronic business is the use of communication and Internet technology to enhance business activities (Barnes & Hinton, 2012).

*Electronic retailing (e-retailing)*: Electronic retailing is the buying and selling of goods and services to consumers via the Internet (Pantano & Priporas, 2016).

*Small business enterprises (SBEs)*: The U.S. Small Business Administration (SBA, 2017) categorized a SBE as a business with yearly receipts below the \$7 million benchmark, 500 or fewer employees for manufacturing or 100 or fewer employees for wholesale. For this study, *SME* is the primary acronym for *small to medium enterprise*.

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

#### **Assumptions**

Assumptions are what a researcher assumes is true without evidence or confirmation (Ellis & Levy, 2009). Identifying assumptions as the onset of the project enhances the truthfulness or credibility of a study (Noble & Smith, 2015). In this research study, I assumed the interviewees would make a genuine effort to participate in the interview process and their responses would be truthful. Secondly, I assumed the interviewees could communicate effectively and expound in detail on the marketing strategies and how the results affected their company's success. Whiting (2008) explained that the qualities of an acceptable interviewee are being knowledgeable, having the ability to reflect, and being willing to talk. It is not prudent to assume all interviewees are effective with communicating or expressing themselves. Finally, I assumed the documents provided for review and analysis were accurate and substantially represented the marketing activities of the business.

## **Limitations**

Ellis and Levy (2009) expounded that limitations are prospective weaknesses in the study that are out of the control of the researcher and usually relate to the type of research method. Aguinis, and Edwards (2014) highlighted that reporting limitations adds to the credibility of a study by acknowledging weaknesses. I chose to interview managers and selected associates who worked at retail establishments. The interviewees' responses to the interview questions may have had biases towards the use of certain marketing strategies. Further, the interviewee may not provide honest responses. This was a weakness or limitation of the study, as a biased or untruthful response affects the credibility of the study. As Cope (2014) explained, credibility is not only the truthfulness of the participant but also the interpretation of data provided by the researcher. The interview questions I chose to use addressed the research question. However, there are situational factors not highlighted in the interview questions that may have had an impact on the success of an organization's marketing strategies. Examples of situational factors include technology savviness of the retailer's target consumers, competition in the local and online markets, and availability of goods or products from vendors in the supply chain. Whiting (2008) explained semistructured interviews are optimal for in-depth dialogue through predetermined questions and subquestions; however, situational factors are beyond the scope of the interview questions and may not come up in the discussion. It is important to identify the limitations of a study to acknowledge areas that may affect the internal, external, or construct validity (Aguinis & Edwards, 2014). Employing the

multiple case study design and triangulation addressed the limitations to this study and improved validity.

### **Delimitations**

The researcher is responsible for defining the boundaries of the study. Delimitations are the factors or criteria outside the scope of the study (Ellis & Levy, 2009). The scope of this study was limited to the business and marketing practices of small retail managers or leaders in the Central, Tri-cities, and Southside areas in Virginia. Further, Ellis and Levy (2009) explained that delimitations are the factors, constructs, or variables intentionally eliminated by the researcher. The interviewees for this study were managers, leaders, or upper level associates as opposed to lower level employees. Finally, the study participants were from retail establishments that sold in both brick-and-mortar and online markets. The transferability of this study was limited to small retailers 5 years or older, with 25% or more revenue in EC sales as well as operating in physical locations.

### **Significance of the Study**

The results of this study could help SBE managers adopt strategies for long-term sustainability and competitive advantage when selling in online markets. Alford and Page (2015) explained it is imperative for small businesses to adopt e-business as a practice for expansion; small businesses are at a significant disadvantage when compared to larger firms regarding resources, marketing strategy, and relationships. In this exploratory study, I sought to highlight effective marketing strategies that small brick-and-mortar retail establishments can implement for competitive advantage.

### **Contribution to Business Practice**

The primary objective of this study was to provide useful information regarding marketing strategies for SBEs in the Central, Southside, and Tri-Cities area of Virginia to gain competitive advantage or long-term sustainability in their competitive markets. While the growth of EC has been increasing since the 2000s, SBEs were at a disadvantage in the competitive landscape for electronic retailing due to lack of participation in online markets (Mazzarol, 2015). While the lack of a firm's financial resources is a major barrier to adoption and implementation for SBEs, adoption of EC remains a source for sustainable business in the long-term and market expansion (Alford & Page, 2015; Sila, 2013).

CRM is significant to the competitive advantage for SMEs (Harrigan & Miles, 2014). Armstrong and Kotler (2015) explained that CRM is a business strategy that targets a precise group of consumers in both physical and virtual environments with practices that deliver quality sales, service, and marketing. The new knowledge that may result from this study is effective marketing strategies for SBEs that have adopted or are considering adopting EC for their business.

### **Implications for Social Change**

The implication for social change includes the potential to provide SBEs in the Central, Southside and Tri-Cities areas, as well as other communities with ideas for long-term sustainability and marketing strategies for competitive advantage. This study could help small businesses and communities needing economic revitalization or robust business activity. SBEs in the United States contribute significantly to job creation and

gross domestic output. SBEs have consistently contributed more than 40% of nonfarm private sector gross domestic product (GDP) since the late 1990s (SBA, 2012).

Accordingly, SBEs are a vital contributor to the health of the U.S. economy. The SBA (2016a) reported U.S. SBEs employed approximately half of the country's private workforce at 56 million people. Between 1993 and 2011, small businesses comprised 63% of net new private jobs (SBA, 2012).

A key measure of community vitality is the number of entrepreneurs or startups in the area. Small businesses drive net new job creation and private sector GDP (SBA, 2012). In 2015, both the Tri-Cities and Southside areas' unemployment rates ranked higher than the state average and U.S. average at 6.4% and 5.0% respectively (Virginia Employment Commission, 2017a, 2017b). Business startups of firms with fewer than 250 employees through the third quarter in 2016 for both Tri-Cities and Southside areas showed a marked decrease from 2015, with decreases of 20% and 34% respectively. In comparison to the third quarter in 2014, Tri-Cities had approximately the same number of new startups in 2016; whereas the Southside area registered a decrease of 23% when comparing 2014 and 2016 (Virginia Employment Commission, 2017a, 2017b). Small business creation and sustainability are critical to the healthy job creation in the state of Virginia, which ranked 21st in the nation for new small business startups in 2014 (Council on Virginia's Future, 2017). A community with a robust growth of new business startups and sustainability of current small businesses aids the employment rate, new job creation, and economic activity of the community.

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

The purpose of this qualitative multiple case study was to explore effective marketing strategies that some small store retail managers use to sell apparel and accessories in online markets successfully. Firms that adopt e-retailing are better equipped to expand the market, increase market share, and reach new suppliers or chain members (Sila, 2013). Llach and Alonso-Almeida (2014) affirmed small businesses must be visible on the Internet with an e-marketing strategy. For this study, I examined the literature regarding the adoption conceptual framework, TOE, to highlight the antecedents to EC adoption among SMEs. Further, a discussion about relationship marketing and CRM highlights significant factors for CRM processes.

The following review of academic and professional literature is a synthesis of contemporary literature about technology adoption and marketing strategies to successfully sell apparel and accessories in online markets. The organization of this literature review consists of background information regarding e-retailing adoption in SBEs. There is a discussion of the TOE framework. I address marketing strategies, particularly in the realm of social and digital technology. The organization of the literature is as follows: TOE framework, complementary conceptual framework, electronic retailing growth, SBE, and CRM and contemporary strategies.

My strategy for researching relevant literature included extensive use of Business Source Complete, ABI/Inform Collection, and Sage Journal databases via the Walden University online library. Google Scholar was an ancillary resource for locating relevant literature. I used the Ulrich's Web Global Serials Directory tool to verify peer-reviewed



status for each journal. My literature review is a compilation of 77 sources that comprise journal articles, government reports and data releases, and books. Of the 73 journal articles, 71 articles or 92% are peer-reviewed sources. Sixty-six or 86% of the total 77 research sources used for the compiling and synthesis of extant research on the subject matter were published within the 2014-2017 timeframe for contemporary research. I used two books for key research terminology. I used two governmental reports to obtain statistics and information regarding SMEs. The subsequent synthesis of extant literature explores internal and external factors affecting the adoption of e-retailing as well as contemporary marketing strategies.

### **TOE Framework**

The TOE framework, first introduced by Tornatzky and Fleischer (1990) in the seminal work *The Process of Technological Innovation*, addressed the adoption and implementation of technology by engineers. The framework consisted of factors, internal and external, to predict the predisposition of technology adoption. The theoretical framework presented a supposition on what influences an organization to adopt technology into its business model (Tornatzky & Fleischer, 1990). In the context of SBEs and the adoption of EC, it is significant to consider existing organizational factors as well as the potential impact of adoption. TOE framework functions as an antecedent to the decision to adopt and as a tool for careful consideration. The empirically tested TOE framework has been a suitable predictor of technology adoption (Awa et al., 2015; Chatzoglou & Chatzoudes, 2016; Duan, Deng, & Corbitt, 2012; Lin, 2014; Sila, 2013). The framework has applied to varying disciplines for the analysis of technology adoption

readiness (Aboelmaged, 2014). Further, TOE framework has been tested in numerous empirical studies concerning EC adoption (Aboelmaged, 2014; Oliveira & Dhillon, 2014), B2B information communication technology (ICT) adoption (Sila, 2013), value chain processes and improvements (Aboelmaged, 2014; Tsou & Hsu, 2015), and virtual worlds (Yoon & George, 2013).

Tornatzky and Fleischer (as cited in Baker, 2012) asserted that technological conditions, organizational conditions, and the industry environment influenced the adoption of technological adoption. This study will examine the factors associated with each TOE element in the context of EC adoption and how the subsequent adoption influences marketing strategy decisions for SBEs. Operating in an EC sales channels heightens the opportunity to monitor consumer response and buying behaviors. The sales channel requires a unique set of strategies for fostering long-term customer relationships. Tolstoy, Jonsson, and Sharma (2016) explained selling in online markets involved website design, communication, customer satisfaction tools, and retention. The TOE framework was applicable in studies in not only developing and developed countries but also American, Asian, Africa, and European countries (Malak, 2016). I explored 15 constructs in the TOE framework to explain SMEs' propensity to adopt the technology, specifically EC. The following section is an examination of extant studies that used the TOE framework and a discussion of similar adoption frameworks.

Bordonaba-Juste, Lucia-Palacios, Polo-Redondo, and Grunhagen (2014) advocated for the adoption of EC as a viable business model in a highly competitive retail environment, citing a significant impact on the value chain from logistics, operations,

marketing, and sales to HR management. SBEs adopting technology is a pathway to improving competitive performance (Ramdani, Chevers, & Williams, 2013). EC improves efficiency, market penetration, and customer relationships (Oliveira & Dhillon, 2015). The adoption of technology as a business model, such as EC, is a significant CRM enabler (Harrigan et al., 2014).

Specifically, in the realm of customer relationships, Hutchinson, Donnell, Gilmore, and Reid (2015) affirmed that CRM is critical to SMEs operating in the retail fashion sector. A study of information communication technology (ICT) adoption in small service enterprises highlighted that the adoption of technology positively affected a firm's sustainability, profitability, and consumer insight (Llach & Alonso-Almeida, 2014). Thus, it was crucial that small firms use ICT and CRM as a vehicle for competitive advantage by way of innovation. Hutchinson et al. (2015) explained small enterprises typically face less formal internal systems and limited resources, thereby restricting marketing practice and at times reduced to informal, reactive marketing decisions. SBEs adopting EC is an essential factor for competitive advantage in the context of CRM.

It is critical to understand the factors that influence adoption of EC. Ramdani et al. (2013) revered TOE as an integrative framework used to explain adoption propensity for different types of innovation ranging from e-business, organizational systems, to general applications. Consistently, the TOE framework supported empirical studies on the propensity to adopt innovation or technology (Lin, 2014). The framework is a comprehensive tool applicable to SBEs' propensity to adopt e-retailing (Duan et al.,

2012). The sum of the technological, organizational, and environmental context elucidates the opportunities and threats present for the adoption or lack of in e-retailing (Baker, 2012).

Using the TOE framework, Yoon and George (2013) explored factors that influence the adoption of virtual worlds for businesses. The researchers chose to use the framework based on prior applicability to the adoption of information technology (IT) innovation studies. Tsou and Hsu (2015), in their study on IT managers, focused on using the TOE framework to address the adoption of open systems of technology that promoted data exchange and cooperation and compatibility between internal and external applications. Using a questionnaire of Taiwanese IT companies, the researchers found organizational and environments factors positively related to the adoption of service. Lin's (2014) and Tsou and Hsu's studies both affirmed the impact of TOEs constructs on technology adoption (Malak, 2016).

**TOE studies and applicability.** Tornatzky and Fleischer's TOE framework is a robust tool used to explain the adoption of e-business as a viable business model (Ramdani et al., 2013). The launch of the Internet introduced a new realm of possibilities in the context of consumer shopping. Awa et al. (2015) highlighted the significance of EC adoption and technology as avenues for cost reduction, enhanced outputs, improved value chain, and heightened knowledge transfer. The TOE framework was useful and helped identify the key underpinnings to electronic adoption, which included not only the technology but internal organizational factors and external environmental factors (Lin, 2014). Using the TOE framework to examine the adoption of supply chain management

systems employing electronic tools in Taiwan, Lin (2014) highlighted management's perception of adoption benefits and costs associated. While management played a critical role, environmental factors exacerbated the propensity to adopt as trading partners usage rate was significant (Lin, 2014). Sila (2013), who tested nine adoption factors using a quantitative methodology, concluded the TOE framework was significant for studying the propensity to adopt EC technologies, particularly for B2B e-business adoption, while highlighting the significance of firm size and ability to implement technologies. Further, significant to adoption decisions were competitive pressure, management support, and network resources.

In conclusion, the TOE framework is an effective tool for predicting the propensity for technology adoption. Contemporary researchers have indicated the TOE framework was a holistic approach to research and more exhaustive analysis of the propensity to adopt e-retailing. Moreover, the external factors and intrafirm capabilities foci of the TOE framework enhanced content validity (Chatzoglou & Chatzoudes, 2016). For this study, I used the TOE framework to examine characterizations of organizations and their propensity to adopt EC for the intention to improve competitive advantage and marketing strategies. The next subsections include discussion of the constructs of the TOE framework as elucidated and described by extant studies.

**Organizational conditions.** Organizational conditions are internal capabilities that may have a moderating impact on technology adoption including financial and HR (Chatzoglou & Chatzoudes, 2016). Tenets such as management support were critical to adoption and implementation (Lin, 2014). Contextual variables included not only top

management support, but also firm size, firm type, and management levels (Sila, 2013; Wang, Li, Li, & Zhang, 2016). Further, the influence of firm scope, technology infrastructure, management knowledge, and commitment were critical factors to e-business adoption (Chatzoglou & Chatzoudes, 2016). Supplementary studies concluded that the adoption of e-business was reliant on strategy change, management change, and implementation of new marketing tactics (Bordonaba-Juste et al., 2014).

Organizational conditions included the firm's business scope, top management support, organizational culture, HR quality, size, and resources (Awa et al., 2015). A different perspective on the organizational construct included a framework comprised of firm size, the degree of centralization and formalization, HR capabilities, and managerial structure (Barnes & Hinton, 2012). Herzallah (2015) introduced a complementary framework with a focus on the organizational perspective that encompassed upper management's knowledge of information systems, commitment to innovation, and focus on business size and access to resources. The range of my study's discussion was of business scope, upper management support, organizational culture and structure, HR quality, firm size, and firm resources and capabilities.

***Business scope.*** Business scope is the reach of the organization's products or services in local and international markets (Ramdani et al., 2013). The use of digital tools has positively impacted the expansion of sales channels and the ability for businesses to reach international markets (Tolstoy et al., 2016). The collusion of brick-and-mortar and online retailing has fundamentally changed consumer behavior, thereby impacting markets and opportunities for expansion (Bălășescu, 2013). Bălășescu found the size of

the firm and a firm's scope were significant factors affecting e-business adoption. To illustrate, as a firm increased in size, the need for e-business intensified. When a manager's focus is on enlarging the business scope, e-business is a formidable option (Chatzoglou & Chatzoudes, 2016).

Firms with a larger scope of business are more likely to adopt e-business to improve supply chain costs, inventory management, and consumer involvement (Awa & Ojiabo, 2016). Chatzoglou and Chatzoudes (2016) explained that many SBEs perceive e-business as out of their current scope though e-business can enhance knowledge transfer when expansion is imminent. Further, in some instances, the value of expansion into online markets was not instantly evident (Tolstoy et al., 2016). A firm with a larger scope benefited from the combined effect of e-business adoption and supply chain capabilities (Chatzoglou & Chatzoudes, 2016).

***Upper management support.*** Management's dedication to innovation and newer technology is significant (Yeboah-Boateng & Essandoh, 2014). Sila (2013) posited that upper management attitude towards innovation and change is critical. Ramdani et al. (2013), in agreement with Alford and Page (2015) and Lin (2014), stated that upper management support was significant and regarded as a critical factor. Decisions regarding technology are crucial for SBE managers, as the wrong investment could prove terminal for the business (Grant, Edgar, Sukumar, & Meyer, 2014). Managers who supported innovation and promoted a mission or vision highlighting innovation were favorable to technology adoption (Baker, 2012). Alford and Page and Lin maintained that the

adoption of technology in SBEs was likely to occur when the owner recognized the benefit of e-business adoption.

While management support is significant to adoption, support impacts the actual implementation of EC. Upper management's support and positive attitude towards e-business adoption are critical to the success of implementation (Duan et al., 2012; Sila, 2013). Further, according to Oliveira, Thomas, and Espadanal (2014), upper management's evidence of commitment by way of financial and organizational resources is important to adoption.

***HR quality, organizational culture, and structure.*** Organizational structure and perspective had a powerful effect on the implementation of e-business, as Bordonaba-Juste et al. (2014) suggested management and strategy change was inevitable. Organizations with centralized structures were better suited for the implementation of technology as the decision-making originated at the helm (Baker, 2012). Retailers have progressed from the traditional business models that emphasized efficiency and scale to now flexible, agile models for meeting consumer demand (Cao, 2014). Alternatively, analyzing the organizational dynamics, Behringer and Sassenberg (2015) asserted that organizational structure was not significant in social media technology adoption, but driven by employee intention to adopt and use new technology. Further, individual proficiency and a spirit of intrapreneurship enhanced the culture of the organization and ultimately technology adoption. Organizational cultures that foster risk-taking and accept mistakes are significant to innovation adoption (Ciganek, Haseman, & Ramamurthy, 2014).



HR quality concepts included workforce skill set, work design, hierarchical levels, and task decentralization. Conducting an empirical analysis of employees working at small service agencies in Madrid, Llach & Alonso-Almeida (2014) examined 405 travel agencies using a correlational analysis to determine the propensity for technology adoption, HR changes, and company competitiveness. The quantitative analysis results were technology adoption impacted work design and employee voice. The researchers concluded organizational performance via employee activities and skill set improved with the adoption of technology (Llach & Alonso-Almeida, 2014). An alternative study highlighted a positive association between technology adoption and internal linking agents such as cross-functional teams and employees with a stake in the organization (Baker, 2012). Managers with skills in e-business were more likely to support and implement EC (Sila, 2013).

***Firm size, resources, and capabilities.*** Firm size, particularly as it relates to SBEs, is a topic of debate amongst researchers. Lin (2014), Ramdani et al. (2013), and Sila (2013) stated large firms are more apt to adopt EC technologies as they possess factors such as economies of scale, tolerance for risk, power within the supply chain, and less risk aversion. Chatzoglou & Chatzoudes (2016) explained that the most significant factor was firm size. In contrast, Baker (2012) concluded no linkage between firm size and innovation, further Oliveira and Dhillon (2015) explained that smaller firms potentially have an advantage over larger firms in EC adoption. Nguyen, Newby, and Macaulay (2015) concluded that micro and small businesses are more likely to adopt e-

business when managers understand the purpose and a definitive benefit to customers is evident.

A key determinant for technology adoption was the organization's access to capital resources. Online businesses require significant financial investment and organizational design (Barnes & Hinton, 2012). Yoon and George (2013) in their study found organizational readiness such as financial and technical readiness were significant. Awa and Ojiabo (2016) revealed SMEs lack experience and resources to implement digital programs. Essentially, organizations need to have sufficient resources available to adopt. The lack of a firm's financial resources was a major barrier to adoption and implementation for SBEs (Sila, 2013). SBEs need technology and financial resources to adopt EC technologies (Ramdani et al., 2013). Subsequently, SBEs are more likely to adopt EC if the short-term benefit is readily reachable and recognizable (Duan et al., 2012).

Frequently, SBEs place limited focus on the supply chain methods in the context of e-business (Caldwell, Harland, Powell, & Zheng, 2013). The researchers explained that while e-business increases communication and opportunity to meet the needs of customers, the supply chain assumed risk when operating in the distribution channel. Risks included system integration, business models, business processes, technologies, and service level.

**Environmental conditions.** The convenience of online shopping and instances of better pricing is driving the growth of online retailing and spawning a highly competitive retailing environment (Akbar & James, 2014). In the retailing industry, modern

technology and economy have led to a heightened demand for products and services thus spawning a need for innovation to improve the value chain. Bălășescu (2013) defined current innovative concepts for retail success as social media and mobile technology, cloud computing, social commerce, and mobile commerce. Bălășescu further explained that the reasons for innovation in retail consisted of (a) maintaining competitive advantage, (b) preserving market position, (c) maintaining the efficiency of operations, (d) reducing production costs, (e) surviving an evolving market, and (f) meeting evolving client's needs and expectations.

In the context of TOE, the external environment consists of competitors, customers, and buyers, as well as, technology service providers, and the regulatory environment (Baker, 2012; Chatzoglou & Chatzoudes, 2016). Sila's (2013) extended the list of external factors to include competitive pressure, customer request, and external partner's feedback. Chatzoglou and Chatzoudes (2016) developed a construct of competitive pressure, consumer readiness, government support, and capabilities of a supply chain as a framework for analyzing the external environment.

The foci of the environmental component are external factors affecting the propensity to adoption technology or e-business. The environmental context comprised of industry, competitors, and regulatory environment, as well as, external customers and buyers (Barnes & Hinton, 2012; Chatzoglou & Chatzoudes, 2016). The technology context, expanded from an internal context, can encompass technology infrastructure, workers technical skills, and developer's capabilities, as well (Awa et al., 2015). The

external environment discussion for this study included factors such as competitive pressures, external support, and trading partner readiness.

***Competitive pressure.*** From 2009 to 2014, brick-and-mortar department store retailers experienced 4% drop in growth while online retailers experienced a 10% increase (Kumar, Anand, & Song, 2017). In 2015, there were over 5 billion EC retail sites in the world. brick-and-mortar over saturation have led to a repurposing of retail spaces, downsizing, and the proliferation of e-retailing. Further supporting the discussion about the rise of e-retailing, Grant et al. (2014) advanced that SBEs adoption of e-retailing is likely to be more short-term in scope and more reactive to competition.

Competitive pressures are significant (Yoon & George, 2013). The researchers explicated when an organization experienced a loss of competitive advantage there was the propensity to keep up with competition. Additionally, when trade associations and professional partners adopt virtual worlds, then the propensity to adopt is significant. Significant pressure is typically evident when suppliers and customers influence the adoption (Ciganek et al., 2014). In contradiction to Yoon and George (2013), Aboelmaged (2014) asserted that competitive pressures were not influential on technology adoption for SMEs. The researcher surveyed 308 managers of manufacturing firms and using a quantitative analysis tool he combined two frameworks TOE and technology readiness index (TRI) for the assessment of e-maintenance technology readiness. Aboelmaged (2014) explained that in situations where competitive pressures are not a key driver ambivalence to adopt may be attributed to uncertainty about the new systems and the consequences of adopting. Further, initial decisions regarding technology

adoption typically begin with influence from industry associations and user groups (Ciganek et al., 2014).

***External support and trading partner readiness.*** Building on the TOE framework, Chatzoglou and Chatzoudes (2016) concluded that government should play a role in stimulating e-business via tax and business laws, as well as, working to improve infrastructures and provide subsidies. Government agencies need to invest in digital infrastructure to benefit SBEs seeking to engage in EC (Mazzarol, 2015). Further, policy support, legal protection, banking support, and logistical and transportation systems expedite the adoption rate of technology by SBEs (Kurnia, Choudrie, Mahbubur, & Alzougool, 2015).

**Technology conditions.** In 2016, e-retailing continued to grow at a strong rate with a 15.1% increase in sales compared to 2015 (U.S. Department of Commerce, 2017). Rapidly growing industries or industries with intense competition tend to innovate at a rapid pace (Baker, 2012). Innovations, such as the EC, have placed small businesses at a critical moment when considering methods for long-term sustainability. Nonetheless, the high costs of implementing e-business served as a constraint to adoption for small businesses. Sila (2013) advanced that the adoption of e-business led to cost savings for wider access to global markets, thus reducing inventory and improving supply chain costs. Technological tools have transformed the method in which consumers shop. Particularly in industries where discontinuous innovation, such as the Internet, is prevalent businesses must make decisive decisions about adoption of technology and

methods for remaining competitive (Baker, 2012). Use of the Internet for online selling is a viable business model (De Souza & De Sousa Batista, 2017).

There are distinct technology adoption characteristics for SBEs including (a) greater susceptibility to risk, (b) higher failure rate in adoption, (c) lack of technical expertise, and (d) inadequate capital and organizational planning (Duan et al., 2012). There are risks associated with EC adoption. Grant et al. (2014) highlighted the perception of risk regarding threats such as security breach, credit card fraud, and software viruses as significant antecedents to adoption for SMEs. Additional factors to consider in the technological context included cost, complexity, network reliability, data security, scalability (Sila, 2013). Prior studies on SBEs and the adoption of e-business technologies the researchers concluded drivers such as enhanced market intelligence, improved relationship management, reduced operating costs, and real-time operating model as drivers for adoption (Grant et al., 2014). In Tornatzky and Fleischer's (1990) seminal work, technology was defined as technology existing or not yet adopted. For this study, the technological environment domain encompassed technological infrastructure, technical skills, readiness, perceived compatibility, and risks.

***Technological infrastructure, skills, and readiness.*** Chatzoglou and Chatzoudes (2016) affirmed that in the context of technology, the organization's IT infrastructure or hardware and skill set are factors to consider for technological readiness. Technology infrastructure is an internal resource that influences technology diffusion and critical to adoption (Aboelmaged, 2014; Awa & Ojiabo, 2016). A key component of a retailer's technological infrastructure is the online website. A retailer's website is a significant

channel for selling and communication (Shobeiri, Mazaheri, & Laroche, 2015). In a study on consumer's attitudes and beliefs, retail managers with a concentrated focus on quality systems, information sharing, and service had a competitive advantage (Shobeiri et al., 2015). The researchers highlighted the method for attaining these three factors was by building a technological infrastructure that ensured ease of use, protected personal information, and easy access. In contrast, one study revealed technological compatibility was a deterrent to technology adoption (Ramdani et al., 2013). In contrast, Yoon and George (2013) purported that technological factors did not have a significant influence on the propensity to adopt. The researchers inferred that the survey respondents perceived virtual worlds as a more social phenomenon and not technological innovation. Oliveira et al. (2014) study revealed that technology infrastructure and worker competency is necessary for technology integration.

Employee competence and readiness are critical to adoption (Aboelmaged, 2014). Firms with employees possessing high levels of skills and technology competency had a higher propensity to adopt e-business (Llach & Almeida, 2014; Sila, 2013). Organizations with employees possessing higher levels of proficiency in social technology were more likely to accept and adopt new technologies early (Behringer & Sassenberg, 2015). In the case of an SBE with low technology usage by the owner/manager, the firm was less likely to adopt. De Souza and De Sousa Batista (2017) advanced the absence of readiness is detrimental to an organization's implementation and development of EC.

***Risks and perceived compatibility.*** There are risks associated with EC adoption. E-business increases risk privacy and security breaches (Caldwell et al., 2013). In a quantitative study of SMEs in Nigeria operating in the six fastest growing industries, security was a critical adoption factor (Awa & Ojiabo, 2016). Data security served as a hindrance to business applications for EC increased vulnerability to security breaches with factors including outdated services, applications, and software (Sila, 2013). Perceived risks associated with e-business adoption included viruses, credit card fraud, and service attacks (Grant et al., 2014). In opposition, Bălăşescu (2013) concluded cloud computing was needed to process data better as it relates to consumers and purchase patterns to provide personalized shopping experiences and engagement.

**Complementary frameworks.** The TAM framework is alternative adoption framework. Awa and Ojiabo (2016) explained the primary tenets were the technological aspect irrespective of external factors. Using the TAM (Technology Acceptance Model) framework, one quantitative study validated the predictive power of the TAM framework across cultures and established that e-retailers adapt website presence in the context of cultural expectations and norms and the perceived ease of use for consumers was critical to influencing customers (Ashraf, Narongsak, & Seigyoung, 2014). To extend the tenets of TAM, the E-business technology acceptance model (EBTAM) is a complementary framework. Leyton, Pino, and Ochoa (2015) used the EBTAM for applicability to small and medium-sized organizations for technology acceptance prediction and found that SMEs have scarce human and economic resources, thereby making it challenging to adopt newer technology frequently. The researchers utilized a quantitative method to



evaluate three businesses in varying stages of technology adoption. Testing the applicability of EBTAM as a predictive tool, Leyton et al. asserted that concerning technology adoption factors included perceived ease of use and satisfaction of system requirements were significant. TAM and EBTAM differ from TOE in that the focus is on individual adoption, as opposed to organizational level decisions (Malak, 2016).

Awa and Ojiabo (2016) explained the innovation diffusion theory (IDT) framework focused on the organization and technology with no emphasis on the environmental domain. IDT is a framework for a multi-stage diffusion for innovation and a framework for understanding the entire process of implementation (Wu & Chiu, 2015). The three domains in IDT are innovation, individual, and organization. IDT theory differs from TOE in TOE includes the external environment as a basis for examination of the factors and propensity to adopt technology (Malak, 2016).

To conclude, Kurnia, Choudrie, Mahbubur, and Alzougool (2015) emphasized that the diffusion of innovation (DOI) was the dominant theory used to explain EC adoption and SMEs. Awa and Ojiabo (2016) in contrast cited TOE significantly supported studies regarding EDI and ICT adoption. Researchers employ DOI to explain the adoption and diffusion of technology by examining time to adoption, societal characteristics, innovation, and channels of communication. Researchers using the theory explicated how certain characteristics impact the rate of technology adoption. DOI and TOE theories cover the organizational level of decision making as opposed to individual particularly for IT adoption research (Malak, 2016). DOI theory differs from TOE in that the focus of the process by which a consumer adopts a product is the emphasis. TOE

premise is a compilation of internal and external factors impacting the inclination to adopt (Malak, 2016). For this reason, I chose to use the organizational level theory, TOE framework as it was a more comprehensive lens.

Half of all new business establishments survive 5 years or more, and one third survive 10 years or more (SBA, 2016b). With these sobering statistics on small business' survival rates, managers face tough decisions on effective business models and marketing strategy. Firms that engage in EC are better equipped to expand the market, increase the market share, and reach new suppliers or chain members (Sila, 2013). Sila's (2013) findings indicated firms are more likely to adopt EC when the potential to reach new markets, and supply chain members are evident and perceived as great value added to the business. The TOE framework discussion delivers a working model for applicability to SBE and EC adoption. There are varying studies of significance using the TOE framework for EC, e-retailing, and e-business adoption (Table 1). Significant factors including (a) upper management support of e-business technology adoption and (b) external factors such as pressure from competitors and network reliability are significant.

Table 1

*Summary of EC Adoption in SME Context and TOE Framework*

Author(s)	Thematic Category	Key Study Findings
Bordonaba-Juste et al. (2014)	e-business adoption	E-business has impact on strategy, management and marketing.
Duan et al. (2012)	E-market in Australia	Upper management support is critical
Ramdani, Chevers, & Williams (2013)	Enterprise applications	The adoption of CRM. Compatibility, firm size, top management were significant
Sila (2013)	B2B EC adoption	Management support, firm size, and competitive pressure significant to adoption.
Yoon & George (2013)	Virtual world adoption	Organization readiness were significant
Aboelmaged (2014)	e-Maintenance Readiness	Technological infrastructure and employee competences are crucial.
Lin (2014)	e-SCM adoption	Upper management support is critical
Oliveira & Dhillon (2015)	B2B EC	Technology readiness and trading partner collaboration is important drivers for adoption.
Tsou & Hsu (2015)	IT managers Open system adoption	Organizational and environmental factors positively related to adoption of service
Awa & Ojiabo (2016)	SMEs in Nigeria	Technology infrastructure is critical to adoption
Chatzoglou & Chatzoudes (2016)	E-business adoption	Most significant factor in adoption is firm size

**SBEs**

The SBA (2016b) reported in 2013 that there were 28.8 million small businesses in the United States. In 2010, SBEs comprised 44.6% of all non-agriculture gross domestic output in the U.S. economy (SBA, 2012). The SBA (2016c) established

standards for determining what qualifies as a small business under the Small Business Act of 1953. In 2009, there were five primary factors for determining industry structure: industry, startup costs, and entry barriers, distribution of firms by size, the degree of competition, and average firm size. The benchmark for anchor size standards were \$7.0 million for services, retail trade, construction, and other industries in yearly receipts; 500 employees for manufacturing and 100 employees for wholesale. As of 2015, small businesses were 97.7% of all businesses in Virginia and 46.9% of the total workforce (SBA, 2016a).

Alford and Page (2015) noted SBEs with a strong web presence are more likely to double in growth compared to an SBE with no web presence. The adoption of technology aided small businesses in analyzing customers, reacting to changes in the environment, improving the supply chain, and customizing products and services (Bordonaba-Juste et al., 2014). Furthermore, Jones, Simmons, Packham, Beynon-Davies, and Pickernell (2014) highlighted the adoption of technology by SBEs increased profitability and competitiveness. Herzallah (2015) asserted in his research that SBEs would falter unless they adopt full usage of the Internet. Jones et al. (2014) purported failure to adopt ICT was not an option for SBEs.

Chatzoglou and Chatzoudes (2016) wrote small business was slow to adopt technology due to financial resources, lack of expertise, poor government support. Further, Alford and Page (2015) wrote that research revealed SBE adoption of the Internet is limited, despite the evidence of sustainable competitive advantage when coupled with management skills, innovation, and business process. SBEs endure, because

of size and lack of committed resources, challenges with adoption to participate in online markets (Awa et al., 2015; Harrigan & Miles, 2014). Typical disadvantages for SBEs included firm size, financial resources, limited exposure to global markets, and limited technological resources (Faloye, 2014). SBEs constrained by less formal internal systems and limited resources, thereby affecting marketing activity and decisions (Hutchinson et al., 2015). SBEs are slow to adopt EC and invest less in EC technologies (Faloye, 2014). Harrigan and Miles (2014) explained challenges including lack of resources, marketing expertise, small budgets, and access to technologies weakens the SBEs ability to compete and retain customers. In response, SBEs can overcome increased competition by adopting EC into their business model. SBEs adopting a website and e-mail as mere participation in the digital realm are not doing enough to sustain competitive advantage (Chatzoglou & Chatzoudes, 2016).

**E-retailing and SBE.** Small fashion retailers operate in a turbulent marketplace characterized by intensified competition amidst shifting consumer shopping behaviors (Hutchinson et al., 2015). SBEs are in a better position to compete in such an external environment with the advent of IT systems (Faloye, 2014). Benefits for SBEs participating in e-tailing included (a) potential to reach larger markets through the website, (b) ability to communicate and conduct business globally and (c) low investments as consumers have access to the Internet (Sheikh, Shahzad, & Ishak, 2016). Sila and (2013) conducted research on small businesses to business (B2B) firms and found a positive relationship between a firm's performance and the propensity to integrate EC into the day-to-day operations. E-business adoption facilitated the

opportunity to use existing information, as well as, acquire new data and knowledge (Chong et al., 2014).

A review of extant literature on the impact of digital technology on SBEs in the context of EC, e-marketing, and e-business marketing strategy revealed that SBEs were at a disadvantage in the competitive landscape for e-tailing due to lack of participation in EC thus resulting in decreased competitiveness (Mazzarol, 2015). The threats to SBEs seeking to engage in e-commerce are vast (Mazzarol, 2015). For example, there should be a heightened focus on cyber-crime and security. Despite the costs and risks associated, extant literature presented a significant case for SBEs to engage in EC (Mazzarol, 2015).

***E-retailing adoption and SBEs.*** SBEs have new opportunities with the advent of electronic retailing and marketing. While SBEs lag in e-business adoption, e-retailing adoption can mitigate disadvantages against large-scale businesses and strong competitive environments. In a quantitative study of Indonesian SMEs, Rahayu and Day (2015) posited that barriers for SBEs adopting e-commerce were financial constraints, employee skill set, and external support including governmental policies. Another study about the propensity for small businesses to adopt EC, the researcher concluded that whereas small business owners believed that IT adoption could facilitate expansion into national and global markets, the primary constraint was the lack of understanding regarding the use of IT equipment (Kurnia et al., 2015). Minority small businesses were severely deficient in IT adoption, thus contributing to a loss in business opportunities particularly in EC (Kurnia et al., 2015).

One study concluded organizational and technological factors had a greater impact on e-business adoption than environmental factors; specifically, firm size was a significant factor (Chatzoglou & Chatzoudes, 2016). As a firm increased in size so did the propensity to adopt e-business. Further, as a business grew so did the scope requiring a great need to implement e-business practices. E-business practices require operational models built to monitor EC performance and the utility of the business' website. As well, essential to successful EC activity are value drivers such as goal setting, website functionality, social media strategy, website maintenance, and security (Grandour, 2015).

The growth of online retailing has SBEs actively participating in the e-retailing arena. Conversely, there are for some businesses high-cost and unprofitability associated with e-retailing ventures (Hoekstra, Huizingh, Bijmolt, & Krawczyk 2015). One study revealed it took the average customer four shopping visits before the e-retailer profited (Chiu, Wang, Fang, & Huang, 2014). Additionally, CRM for online SBEs was not profitable or yielded an acceptable return on investment in the short run. One challenge was the online SBEs inability to connect with consumers and build lasting relationships (Verma et al., 2015). The following section addresses the contemporary methods for marketing to consumers buying on the Internet.

### **Relationship Marketing and CRM**

Since the early to mid-1990s, the relationship marketing approach has shaped the way organizations develop their overall mission statement and strategy for remaining profitable (Berry, 2002). This approach has evolved into a process whereby the focus is on developing a relationship with new customers and maximizing loyalty with current

customers. A firm's marketing activities scope must go beyond attracting new customers to retaining and building relationships with existing customers. Berry (2002) asserted keeping customers and attracting new customers was a source for advantage for new firms to stave off low growth rates and intense competition in service industries.

Berry's (2002) seminal work *Relationship Marketing* named five core strategies for integration into a firm's overarching marketing plan: (a) core service strategy, (b) relationship customization, (c) service augmentation, (d) relationship pricing, and (e) internal marketing. The core service strategy is services instituted to meet specific needs of long-term and new target customers. The relationship customization is the process is using data to individualize service delivery based on specific needs. The service augmentation is the delivering of products that differentiated from the competition or providing the extras. Relationship pricing involved pricing services that were conducive to long-term relationships such as incentives, coupons, and frequent user perks. Lastly, internal marketing referred to as the focus on conditioning internal employees to deliver quality goods and services consistently with a customer focus.

There is a rapidly changing nature of customer relationships with brands and companies evolving. CRM, an offspring of relationship marketing, is a set of marketing principles and processes instituted to attract new customers and retaining current customers through relationship management (Choudhury & Harrigan, 2014). The tools for today's CRM mix are much different from the early 2000s. Relationship building tools now include Web sites, blogs, video sharing, online communities, and social networks. Organizations are managing their influence in online formats and marketing



through social networks. Harrigan and Miles (2014) advanced that SMEs use social media for CRM strategy and that social media is an opportunity to engage real time with customers and interactive on a personal level while fostering relationship and trust. CRM activities that gather data such as virtual communities, social media pages are tenets of relationship customization. Digital data provides useful insight into trends, customer preferences, and competitive activity (Harrigan & Miles, 2014).

**CRM.** A critical tenet of marketing is relationship marketing, which underscores building relationships with existing customers and attracting new customers for a long-term commitment (Armstrong & Kotler, 2015). A key system for instituting relationship marketing is CRM, defined as systems that facilitate the collection, storing, and analysis of customer data for managing communication channels and strategic marketing decisions (Khodakarami & Chan, 2014). The adoption of ICT that incorporate CRM systems for small businesses is crucial (Llach & Alonso-Almeida, 2014). Examples of CRM systems include e-mail communication or campaigns, customer service and support centers, the point of sale technology, social media, text messaging, and customer databases (Khodakarami & Chan, 2014).

SBEs are more likely to adopt a less formal method of marketing implementation (Alford & Page, 2015). Extant literature elucidated that contemporary tools used for relationship building and consumer engagement included websites, blogs, video sharing, online communities, and social networks (Armstrong & Kotler, 2015; Homburg, Ehm, & Artz, 2015; Killian & McNanus, 2015; Wonsun, 2015). SBE managers, while aware of

the benefits of online customer engagement, were unable to understand and control the process fully (Alford & Page, 2015).

***Electronic Retailing and CRM.*** American EC sales increased from \$298 billion in 2014 to \$341 billion in 2015 and were estimated to reach \$395 billion in 2016 representing a 15% increase over 2015 sales (U.S. Department of Commerce, 2016, 2017). Every year from 2000 to 2010, online retailing grew as more consumers used digital tools to shop and make product decisions (Verma et al. 2016). Verhoef, Kannan, and Inman (2015) noted that digital and mobile channels of distribution had disrupted the traditional retailing model. The collusion of brick-and-mortar and online retailing has fundamentally changed consumer behavior (Bălăşescu, 2013). In the retailing industry, modern technology and economy have led to a heightened demand for products and services thus spawning a need for innovation to improve the value chain (Ashraf et al., 2014). The reasons for innovation in the retail industry consisted of (a) maintaining competitive advantage, (b) preserving market position, (c) maintaining the efficiency of operations, (d) reducing production costs, (e) surviving an evolving market, and (f) meeting evolving client's needs and expectations (Bălăşescu, 2013). The shift in consumer behavior has precipitated a paradigm shift in traditional marketing strategies.

Developments on the Internet, information technology (IT), media, and communications have transformed marketing practices (Sheikh, Shahzad, & Ishak, 2016). A primary shift was the online retail marketing manager inability to connect with consumers and build lasting relationships (Verma et al., 2015). Using a quantitative methodology to analyze consumer behavior in the online context, Akbar and James

(2014) concluded selling online is an important channel of distribution. The changing communication environment, particularly social media, affects the way customers and retailers interact (Choudhury & Harrigan, 2014). Unlike traditional brick-and-mortar locales, the e-retailing experience is devoid of face-to-face interaction (Ayanso & Lertwachara, 2015). With the growth of online retailing and the decline of brick-and-mortar sales, it is imperative to add to the body of literature a framework for CRM in an online environment or social media context (Verma et al., 2015).

*Evolving marketing strategies.* Advances in technology Spekman (2015) expounded have caused B2B companies to anticipate the impact of the Internet, social media, crowdsourcing, 3D printing, marketing communication, and sales/marketing automation on marketing strategies. Thus, there is a paradigm shift in contemporary marketing strategies. The advancement of the Internet and social media as tools for communicating and purchasing consumer goods has the potential to disrupt former business models (Spekman, 2015). After 2009, post-recession, traditional marketing promotion had declined, while business prospects used nontraditional tools such the Internet, Google, and social media to learn and evaluate products (Gagnon, 2014). Four emerging trends for B2B marketing firms post-recession included (a) emerging market growth, (b) globalization, (c) mergers and acquisitions, and (d) advances in technology (Spekman, 2015). Marketers were shifting from measuring brand awareness and trust to content-based online and digital programs with clear, measurable results. Killian and McNanus (2015) examined what mixture of channel characteristics was best when selecting an effective channel for marketing communication strategy for relationship

management. The result was four social channels for marketing communication included: online video sharing, online social networking sites, microblogs, and image sharing sites. Extending the discussion on social networking, Leeflang, Verhoef, Dahlström, and Freundt's (2014) emphasized that marketers needed to focus on improving data analysis capabilities, developing brand recognition, and extending customer relationship strategies in social media vehicles.

The opportunity for improved customer engagement is greater with digital tools that are measurable (Alford & Page, 2015). An example of digital tools for marketing includes, but not limited to, Twitter, blog sites, Facebook, virtual communities, Pinterest, discussion forums, social networks, and LinkedIn (Taiminen & Karjaluo, 2015). Regarding measurability, Yu's (2015) developed an instrument with four constructs (a) e-activities, (b) e-interests, (c) e-opinions, and (d) e-values, which aids marketers in the understanding of consumers that utilize EC and mobile commerce.

Studies on strategies for effective marketing promotion in an online environment based on e-lifestyle constructs revealed a product's popularity and its ability to satisfy consumers' needs for entertainment and personal relationship were significant and intertwined (Koshksaray, Franklin, & Hanzaee, 2015; Yu, 2015). Hassan, Ramayah, Mohamed, and Maghsoudi (2015) final analysis revealed e-activities do not have a significant effect on customer satisfaction while e-lifestyle behaviors shown a significant effect on satisfaction and loyalty. For future studies, marketers needed to address major challenges for digital marketing practices included (a) ability to generate and leverage deep customer insights, (b) ability to manage brand health and reputation amidst social

media, and (c) ability to assess the effectiveness of digital marketing (Leeflang et al., 2014).

*Marketing with electronic CRM (e-CRM) and social CRM.* SBEs lack the resources necessary to compete against larger organizations in CRM activities. Online retailers require a unique set of marketing strategies to develop and maintain successful CRM when compared to brick-and-mortar locations (Harrigan & Miles, 2014). Harrigan et al. (2014) explained the need for search engine optimization and a highly functional website as tools for e-CRM activity for SBEs. On the other hand, Harrigan and Miles (2014) highlighted the significance of e-CRM activity with the integration of social media and marked it as one of the most effective tools SBEs can utilize to build successful CRM. Social media is a key marketing communication tool that provides powerful insight into a social phenomenon and consumer opinions (Tiong & Pei-Chen, 2015). Verma et al. (2014) strongly advocated for relationship management in a social network context. Retail managers have attempted to use online social networks to form a relationship with consumers in the e-tailing environment (Verma et al., 2015). Online media is a critical platform for dialogic communication (Lillqvist & Louhiala-Salminen, 2014). Nitu, Tileaga, and Ionescu (2014) stated social CRM (SCRM) revealed a realistic perspective of consumers and facilitated two-way interaction. The social media environment buoyed interactive activity between the organization and the consumer, thus allowing more relationship building and personalized communication. B2B and B2C consumers were increasingly turning to social media to gain knowledge about products

and as a means of communicating with internal and external stakeholders (Moore, Raymond, & Hopkins, 2015).

In a qualitative study of B2B firms, sales managers used social selling tools more frequently than B2C managers (Moore et al., 2015). The B2B managers used social selling tools significantly more frequently than all sales representatives did. The implication for managers was firms should continuously engage in online and digital formats. While social networks have traditionally functioned as a mode of social communication, it is increasing in popularity to engage consumers (Gautam & Sharma, 2017). Further, Jones and Leonard (2014) explained consumers seek third-party recognition and approval to enhance trust through social networking channels.

While online consumers tend to purchase hard to find products not readily available in brick-and-mortar stores, they also use social networking sites to search for shopping information, suggestions, and consumer feedback (Napompech, 2014). Organizations need appropriate social media strategies for brand management and a strategy that balances short-term revenue plans with long-term brand management via online presence (Gautam & Sharma, 2017). Small online apparel sellers should use social networks to interact with customers. Implications for managers included using social networks to collect information regarding consumer's attitudes, comments, and suggestions (Napompech, 2014).

Wonsun, Augustine, and Hyo (2015) studied top global organizations that used integrated Internet tools including websites, Facebook, and Twitter to support relationships with stakeholders and generate a dialogue with external publics. The

researchers emphasized this study was the first of its kind. Data collection included 100 global brands from the Best Global Brands list for the United States. Five units analyzed included (a) brand website (b) Facebook profile (c) random sample of wall posts (d) Twitter profile, and (e) a random sample of tweets. Each unit of analysis is measured for relationship cultivation and dialogic communication. The results were disclosure and information dissemination were more prevalent than engagement features (descriptions, histories, and mission, link to social media and logos or symbols). Facebook and Twitter were used more for information dissemination than engagement, and more so for announcement or service information. Of the three interfaces, Facebook was supplementary for engagement. The results were that top organizations were not fully exploiting the potential of online media. Thus, as information dissemination was rapidly increasing and the use of nontraditional marketing communication tools growing, Wonsun et al. (2015) advocated for supplementary research regarding social media tools.

Social media technologies have a significant impact on CRM (Choudhury & Harrigan, 2014). The advent of the Internet has facilitated improved customer engagement, consumer interaction and information sharing between business and consumer (Armstrong & Kotler, 2015). Further, the use of social media as a marketing communication tool has the potential to strengthen the bond between the customer and brand (Gautam & Sharma, 2017). In online media, the personalized and more conversational communication was more difficult to manage due to the diverse audience (Lillqvist & Louhiala-Salminen, 2014). Verma et al. (2014) offered a suggestion in the personalization context to do the following when communicating in social networks:

market messages that highlight connection between the consumer and firm; pay close attention and address positive and negative user feedback; broadcast creative content; and engage in multiple channels of digital communication.

### **Summary and Transition**

The purpose of this study was to explore effective marketing strategies that small store retail managers use to sell apparel and accessories in online markets. Section 1 was an introduction to the background of the specific business problem and the contribution of this study to business practices, particularly for SBEs, and to social change. In Section 1 my review of extant literature and seminal provided an insight into contemporary adoption theories such TOE, as well as, complementary theories including TAM, EBTAM, and DOI. As well, there was a discussion about contemporary marketing strategies including CRM and the integration of when selling in online markets.

Section 2 is an overview of the research method and design for my study and techniques for data collection and analysis. It is a compilation of details regarding the participants, research design, data collection, and analysis methods. In Section 3, I discussed details regarding the study findings, results of data analyses, applicability to marketing and retailing discipline, and implications for social change. Section 3 provided extensive discussion and recommendations for appropriate marketing strategies for SBEs operating in physical locations while engaging in e-retailing.



## Section 2: The Project

### **Introduction**

A rigorously documented path of the research process adds to the rigor and credibility of a study (Sinkovics & Alfoldi, 2012). In Section 2, I discuss the research method and design. The areas discussed in detail include my role as the researcher, criteria for study participants, research method, research design, ethical research, data collection, data technique, and data analysis.

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore effective marketing strategies that small store retail managers use to successfully sell apparel and accessories in online markets. The population for the research study included leaders from independent small retail enterprises with both a physical location in the Central, Tri-Cities, or Southside areas in Virginia and selling in an online environment. These leaders have implemented strategies to successfully sell apparel and accessories in online markets. In 2014, Tri-Cities Virginia was below the state average for new business startups, and, with 20.3%, the Southside area had the highest rate of families living at or below the poverty line (Council on Virginia's Future, 2017). The implication for positive social change in this study included the potential to assist SMEs in Tri-cities Virginia with a strategy for long-term business stability to help break the cycle of poverty. Alvarez and Barney (2014) explained that entrepreneurship helps break the cycle of poverty in communities by providing employment, skill development, and job training, which

improve the opportunity for employment and can reduce unemployment in those communities.

### **Role of the Researcher**

In qualitative methodology, the researcher is the instrument for the data collection process and subsequent analysis (Chan, Fung, & Chien, 2013). The researcher's role in a case study design is critically observing and assessing events and situations (Greene, 2014). My role as the researcher in this qualitative study was to provide an honest, informative, and accurate account of an organization's marketing strategic approach for contemporary marketing channels of distribution, communication, and relationship management.

Researchers must spend adequate time in the field to ensure data saturation and identification of new emerging data (Houghton, Casey, Shaw, & Murphy, 2013). I kept extensive notes and used NVivo qualitative research software as a tool to notate decisions made during data collection. I ensured the accuracy of interview responses with thick and rich descriptions. Rich is about the quality of the data (Fusch & Ness, 2015). I provided rich descriptions to express an accurate depiction of the leaders' marketing strategies. Carlson (2010) explained that thick descriptions are in-depth depictions of settings, participants, data collection, and analysis procedures. Chan et al. (2013) explained qualitative data is verbatim data from in-depth interviews. Greene (2014) described the insider researcher's relationship to the study participants as one that has intimate knowledge or familiarity with the participants. I have over 22 years of experience in retailing and merchandising management, which qualified me as a researcher with insider

knowledge. Further, I have a keen research interest in the evolution of EC as a viable distribution channel for small apparel retailers. Greene (2014) advanced that the primary advantages as an insider researcher included knowledge regarding industry jargon, indigenous values and taboos, and authentic culture. I have extensive industry experience, and I live in the geographical area I researched. Using my association with local fashion academics and business owners, I used the connections to attain participants who met the criteria of this study.

The U.S. Department of Health and Human Services, Office for Human Research Protections' (as cited in U.S. Department of Health, Education, and Welfare, 2014) *Belmont Report* is a guide for basic ethical principles in research developed to protect human subjects in medical and behavioral research. I am bound to respect the interviewees, provide beneficence, and act in justice on the fundamental ethical principles. Included in the *Belmont Report* (U.S. Department of Health, Education, and Welfare, 2014) principles is the declaration to treat human subjects as autonomous agents. In an ethical context, my role as a researcher was to allow the interviewees to respond to the interview questions unobstructed. As a researcher, I secured the well-being of the interviewee or provided beneficence. I am obliged to minimize harm. To ensure beneficence, I protected the confidentiality of the organizations and interviewees chosen for the study.

An essential role as the primary researcher is to ensure the data and study results are credible and trustworthy (Cope, 2014). Fusch and Ness (2015) advanced that, particularly for the novice researcher, bias is present because of experiences and cultural

perspectives. Bias can be mitigated by instituting appropriate data collection procedures, including an interview protocol and employing qualitative data analysis computer software. The transcription and synthesis of the data must accurately reflect the participant's views. Elo et al. (2014) explained the researcher's interpretation reflects the participant's voice with thick, descriptive data. I audio recorded interview question responses, took notes, and transcribed the audio recording accurately and comprehensively to avoid misconstruing responses. I employed member checking as a method to guard against bias. Participant verification before the final analysis enhanced the study credibility (Cope, 2014).

NVivo is a query tool used by researchers to enhance the study credibility, validity, and researcher objectivity. From a technical context, NVivo as a query tool helps the researcher guard against biased analysis of the data by preventing continued emphasis on preferred themes (Houghton et al., 2013). I used NVivo software to assist me in the data analysis and to aid in the production of an audit trail during data collection. Carlson (2010) defined audit trail as documentation of all steps and processes in a study. Methods for creating an audit trail included (a) interview notes, (b) observation notes, (c) calendars, (d) drafts of interpretations, (e) audio tapes, and (f) photographs. An audit trail was significant to the process.

Schutt (2015) explained intensive, structured interviews used by a researcher enabled the interviewees to express their attitudes and actions in their terms. Interviews provide more detail and insight to views, opinions, experiences, or processes when compared to other types of designs such as focus groups (Guest, Namey, Taylor, Eley, &

McKenna, 2017). Through intensive interviews, I can accurately develop rich description from the perspective of the organization's leaders and key stakeholders. Chan et al. (2013) explained the way a researcher directed questions affected how the participants responded. I engaged the interviewees in dialogue and built rapport so I could elicit a clear picture of the organization's marketing strategies. While building rapport occurs throughout the interview process, Whiting (2008) explained that during the second phase of an interview, referred to as the apprehension stage, the interviewer and interviewee may experience discomfort and strangeness. One way to alleviate those feelings is to build rapport by opening with relaxed, general conversation.

For this study, I used semistructured open-ended interview questions for data collection. In a study on the use of case studies in research, Massis and Kotlar (2014) explained that the use of semistructured interviews and document review enhanced reliability in research. It is crucial to have planned questions, as well as a plan for prompt questions in the event the interviewee needs to expound to aid in rapport building and smooth transition (Whiting, 2008). I used an interview protocol as a procedural guide. An interview protocol is essential for semistructured interviews to ensure uniformity and replication of delivery (Baškarada, 2014). I established an interview protocol to ensure the delivery of questions with each participant was uniformed. Further, interview protocol aids data saturation as similar questions yield results that can assimilate with the coding of themes (Malterud, Siersma, & Guassora, 2016). I adopted an interview protocol described by Whiting (2008) in a five-phase process: (a) building rapport, (b) apprehension phase, and (c) exploration phase and (d) cooperative phase, and (e)

participation phase. During the initial or introductory phase, the interviewer presents objectives of the study and shares the final use of the researcher findings. In the second phase or apprehension stage, the interviewer creates an atmosphere of comfort and relaxation accompanied with introductions. The exploration and cooperative phase of the interview involves the interviewer asking the main interview questions that are pre-established before the meeting. The participation phase is the shortest in length and may not occur during the process. A full statement of the interview protocol is available in Appendix A.

### **Participants**

Effective marketing strategies used by small apparel retail managers selling in both brick-and-mortar and online markets was the purpose of this study. The primary criterion for participants was businesses that were successful in their marketing efforts for selling in online markets. I used a simulation of the DeLone and McLean (2016) framework for information systems success to gauge participant's online presence and marketing success as a pre-participant criteria assessment. The framework was developed as a model for information systems businesses to access the level of success an organization experienced after information systems adoption. The framework constructs were system quality, information quality, and service quality. The final construct of net benefits is the concluding indicator of a firm's information systems success. Before contacting a potential participant, I analyzed their website using the three domains in the DeLone and McLean framework (see Figure 2 and Appendix F). I reviewed the online retail store to access (a) visual design for attractiveness, (b) system flexibility, (c)

response times, (d) ease of placing and tracking order, and (e) accessibility to secure and easy payments. I reviewed the site for quality of product information and pricing information for accuracy and ease of understanding. Lastly, I reviewed the website usability by examining the navigation, speed, and consistency.

Table 2

*Marketing Strategies Success Summary*

Success Variables	Defined	Characteristics
System Quality	Desirable information system	Attractive visual design  System flexibility Response times Ease of placing and tracking order Secure and easy payments
Information Quality	Desirable system outputs	Accuracy of price and product info Up to date information on website Useful information
User Satisfaction	Attractiveness of website	Enjoyment  Attractive appearance Inspire user control
Usability	Ease of use website	Easy to navigate Error prevention Speed Consistency
Net Impact	Extent of information systems success	Increased sales, improved profits, job creation

*Note.* Adapted from “From E-commerce to Social Commerce: A Close Look at Design Features,” by Z. Huang and M. Benyoucef, 2013, *Electronic Commerce Research and Applications*, 12, 246-259; “Information Systems Success Measurement,” by W.H. DeLone and E.R. McLean, 2016, *Foundations and Trends in Information Systems*, 2(1), 1-116.



Secondly, in Cho and Jin's (2015) study of SMEs' international expansion, the researchers used participant criteria focused on enterprise size, the age of business, and standard industrial classification to study U.S. SBE retailers engaging in internationalization. I used a similar method comprised of the following criteria for the participant pool businesses: (a) fewer than 100 employees, (b) brick-and-mortar location and online website for apparel and accessory goods, (c) 5 years old or older, and (d) 25% of total sales in EC.

The SBA (2016c) definition of small business is \$7.0 million or less for services, retail trade, construction, and other industries in yearly receipts with 500 employees or fewer for manufacturing and 100 employees or fewer for wholesale. I selected small apparel retailers and their managers because a significant case exists for SBEs to participate in EC to overcome competition and expand beyond local markets (Cho & Jin, 2015; Mazzarol, 2015). Thus, a focus on effective strategies for small apparel retail managers provides insight into business models for internationalization, market expansion, and competitive advantage. For age criteria, statistics indicated most successful businesses make it past the benchmark of 5 years (Cho & Jin, 2015). Lastly, selling trends in EC is the benchmark for sales, which states by 2017 EC sales in clothing, accessories, and footwear will reach 25% of total retail sales in the United States (Hortaçsu & Syverson, 2015). The participants were required to have a sales goal or strategy to reach 25% of total sales derived from online markets.

I interviewed small apparel retail managers and staff who resided in the Central, Southside, and Tri-Cities Virginia geographical areas where I live. This area, also known

as the Virginia Gateway Region, is home to a retail trading area of over 1 million people and is laden with downtown boutique shopping districts, indoor malls, and shopping plazas. Commonly, detailed information regarding small business organizations is limited in availability. I sought assistance from the Small Business Development Center (SBDC) of Longwood University and Richmond's Retail Merchants Association (RMA) to locate retail establishments that met the study criteria. Phillips (2014) revealed that SBDC counselors had access to a database that provided detailed industry information and market research. The SBDC provides research assistance to locate entrepreneurs and researchers as the resources and data are vast and a combined effort of the private sector and state and federal government (Kunz & Dow, 2015). Finally, the Richmond RMA is a retail advocacy organization that hosts open attendance networking events and publishes a comprehensive list of local retail partners.

I used the SBDC and RMA to identify potential retail businesses and act as an intermediary when necessary to recruit participants. Petkov and Kaoullas (2016) described an intermediary as an individual or organization that has a business or personal connection to the desired participant that can have a significant success rate at reducing participant resistance. In the event I experienced trouble with gaining access or securing willing participants, the SBDC and RMA were able to act as agents for improving my success rate. Once I identified potential study participants, I accessed their website for an initial screening and gained contact information including business phone number, social media pages, and e-mail. I primarily contacted participants by visiting the physical location or by phone. Joseph, Keller, and Ainsworth (2016) highlighted in their study on

recruiting participants that it is critical for researchers to use preferred methods of contact with participants throughout the recruitment and study phase.

It is important to establish rapport for semistructured interviews (Whiting, 2008). Further, engagement enhances the credibility of a study (Houghton et al., 2013; Lincoln & Guba, 1985). Webb and Barrett (2014) explained five categories of rapport building behavior included attentiveness, common grounding, courteousness, connecting behavior, and information sharing behavior. Specifically, common grounding is highlighting mutual interests or other similarities. I had a close connection to retailing in the geographical area. My familiarity with the area and business climate enabled me to establish common ground with the interviewees before the interview question session. Connecting involved using humor, pleasant conversation, and friendly interaction with the interviewee to establish rapport. Before and during the interview process, I practiced connecting behavior to lessen uneasiness during the rapport-building stage. Information sharing involves providing advice, asking questions, and sharing personal knowledge. I was open to sharing knowledge about the local business climate with the interviewee. Finally, Carlson (2010) highlighted that by allowing participants an opportunity to affirm my interpretation or synthesis of the interview, I can reaffirm rapport with participants via member checking.

## **Research Method and Design**

### **Research Method**

I used a qualitative method for this study. Qualitative, exploratory research is a rich approach to interpreting in-depth insights while contextualized in a naturalized

setting (Leech & Onwuegbuzie, 2007). Qualitative researchers convey a descriptive account of behavioral realities, as well as viewpoints from the respondent's perspective (Barnham, 2015). The focus in qualitative research is less on transferable findings and more on interpreting meaning as given by those interviewed (Sarma, 2015). Further, Barnham (2015) explained qualitative research is optimal for smaller samples accompanied with in-depth analysis.

The research focus of this study was effective marketing strategies from the manager's perspective for small apparel retailers. Qualitative research is effective when studying individualized programs to provide descriptive data for points of view and lived experiences (Yilmaz, 2013). Qualitative research is conducive to studies requiring relativist ontology, subjectivism, naturalistic environment, and inductive reasoning. Further, the methodology is subjective in nature requiring in-depth, holistic, and context sensitive data (Sarma, 2015). Qualitative researchers are concerned with interpretation, meaning, and understanding through inductive reasoning (Yilmaz, 2013). I employed a qualitative methodology for this study because the research was more subjective in nature and not transferable to the larger population, but specialized to a type of retailer.

Sarma (2015) defined quantitative research as a scientific method involving measurement and statistical testing of hypotheses. Yilmaz (2013) explained quantitative researchers used a standardized instrument for testing variables to generalize for a broader population. From the epistemological perspective, quantitative research is objective in nature requiring statistical measuring for validity (Yilmaz, 2013). Sarma (2015) and Yilmaz (2013) explained quantitative researchers emphasized causal

relationship and did not allow for findings in the context of feelings, thoughts, and experiences from the respondent's perspective. The research question for this study necessitated data in the context of thoughts and experiences. The research question was subjective in nature, hence requiring an in-depth analysis in the context of lived experiences from the manager's perspective. Quantitative was inappropriate because the research question was not focused on causal relationship nor was it objective whereby a statistical analysis would prove the stated hypothesis.

The mixed method approach is beneficial for analysis from multiple perspectives and is appropriate when the researcher is attempting to provide complementary views or expansion of a previous theory (Venkatesh et al., 2016). A mixed method as Venkatesh et al. (2016) illuminated is an approach that has a purpose beyond the core research methodology. The core objective of this study was to highlight effective marketing strategies through interviews and document review. Mixed method is purposeful for studies requiring complementary, expansion, corroboration, or divergent viewpoints (Venkatesh et al., 2016). Thereby, a mixed method study was not essential to reach conclusive results. The standardized statistical analysis will not yield insight and detailed descriptive data thereby, quantitative or mixed method methodology was not appropriate to this study.

### **Research Design**

A research design decision is grounded in the research approach and overall research questions. The research design for this exploratory study on marketing strategies is a multiple case study. A case study as Ellis and Levy (2009) explained is empirical

research utilizing diverse elements of data in the context of a naturalized or realistic setting. Cronin (2014) explained that case studies are appropriate for the in-depth analysis of a phenomenon in real life context while not generalized to the overall population. Rather, a case study is specific to context and purposeful in perspective for a specific benefactor or group (Petty et al., 2012). A case study design is applicable for understanding an individual, organization, or system that is complex in nature and comprised of multiple factions working in tandem (Petty et al., 2012). I used a multiple case study design because while multiple organizations with varied consumer base and product offerings operate independently, the illumination of their similarities in marketing decisions was significant for other SBEs aspiring to sell in online markets. Reviewing multiple retail businesses provides a thorough viewpoint of appropriate marketing practices.

In contrast, descriptive studies are appropriate for historical narrative, phenomenological, or ethnography approaches (Ellis & Levy, 2009). The historical approach is a detailed account of events or experiences for interpretation and thematic analysis (Petty et al., 2012). I did not collect information on historical events, chronology on the organization, or personal reflections, rather, I focused on actual strategies employed that have been successful for the organizations. Phenomenological studies apply to studies of lived experiences of a phenomenon (Petty et al., 2012). I was not interpreting or collecting to explain a phenomenon, rather, exploring strategies at work for the organization. Finally, ethnography was a research design revealing behavior, beliefs, and languages in a cultural context that described and interpreted patterns within

a homogeneous group (Petty et al., 2012). The collection of data on marketing strategies does not require an immersive experience where I am participating as an employee; therefore, the ethnographical design was not suitable.

Established methods for advancing the credibility and quality of data for a qualitative study include triangulation (Houghton et al., 2013). Triangulation is a method of cross check interpretation of data collected from varying perspectives (Petty et al., 2012). Triangulation is the process of using differing methods of data collection to gain a comprehensive assessment of the phenomenon (Cope, 2014). Such methods including triangulation and data saturation aid the validity and credibility in case study designs (Houghton et al., 2013). Petty et al. (2012) demonstrated that a strategy for ensuring confirmability, dependability, and credibility of a qualitative study was triangulation. There are four types of triangulation including (a) data source, (b) analyst or investigator, (c) theory, and (d) methods (Carter, Bryant-Lukosius, DiCenso, Blythe & Neville, 2014). Yin (as cited in Yazan, 2015) explained data source or methods triangulation is optimal for case study design. The triangulation of the data will ensure data saturation as a means for accurate results. Triangulation in case studies is essential to reliable and transferable results (Stavros & Westberg, 2009).

I used a methods triangulation for this study. Methodological or methods triangulation is a research method that delivers comprehensive results, validity, and understanding (Hussein, 2015). Carter et al. (2014) emphasized method triangulation is frequently used in qualitative studies employing interviews, observation, and field notes from varying sources including people, groups, and communities. Further, the within

triangulation method was appropriate for the case study design as it involves the use of two or more data collection procedures (Hussein, 2015). Petty et al. (2012) explained case study triangulation commonly included interview, observation, and member checking. Further, document analysis, the process of reviewing and evaluating printed and electronic data material, was a viable method for triangulation when used in conjunction with interviews (Bowen, 2009). Acceptable documents for analysis include advertisements, journals, letters, newspaper clippings, press releases, organization reports, survey results, and photos. A researcher that employs document analysis for additional data collection is doing so to elucidate meaning or knowledge by examining documents to highlight new data and corroborate data from interviews. I chose to use individual interviews, document analysis, and member checking as the method for data saturation in this study.

When separate individuals express the same idea consistently over time, the iteration will reach saturation (Malterud et al., 2016). Data saturation is not about how many interviews conducted but the depth of the information collected (Fusch & Ness, 2015). Specifically, when using computer-assisted qualitative data analysis software, codes with a high frequency of responses for thematic consideration are an indication of saturation (Malterud et al., 2016). Once themes collated from subsequent data collection begin to emerge intermittently, saturation is near. Fusch and Ness (2015) explained once no new data is exposed, then the point of data saturation was imminent.

Francis et al. (as cited in Hennink, Kaiser, & Marconi, 2016) described a three-step process for ensuring data saturation. For this study, I adopted two steps. The first



step or initial analysis stage, the researchers advocated for establishing sample size according to the study's pre-selection criteria for the initial round of data collection. For this study, I conducted an initial set of four interviews at separate organizations. If data saturation is not met, initiating the next step, referred to as the stopping criterion, is necessary. Francis et al. (as cited in Hennink, Kaiser, & Marconi, 2016) defined stopping criterion as the process of continuing to interview participants and testing for emerging themes until no new themes emerge. Stopping criterion is continual until meeting data saturation. I would continue to conduct additional interviews if new themes emerged after the initial data collection process until I reached data saturation.

### **Population and Sampling**

I used a purposeful sampling method for selecting businesses for the multiple case studies. Gentles, Charles, Ploeg, and McKibbin (2015) offered the definition of purposeful sampling as choosing participants based on the relevance of information as it relates to the research question. Duan, Bhaumik, Palinkas, and Hoagwood (2015) explained purposeful sampling, widely used in qualitative research, is a method useful for studies with limited resources with the intentions of identifying common patterns and facilitating group interviewing. Whereas, Gentles et al. (2015) asserted purposeful sampling is robust for information rich, in-depth studies fundamental to the research purpose.

The population for this research study included participants from four independent small retail enterprises with both a physical location in the Central, Southside, or Tri-cities area in Virginia and a functioning website for selling products

online. Fusch and Ness (2015) advocated that researchers interview multiple participants to gain varying perspectives to ensure data saturation. The researcher signaled against interviewing managers only to avoid skewed perspective or guarded responses. Therefore, I interviewed store managers, marketing managers, or online managers that worked consistently with the marketing functions of the business.

There are seven principles to selecting the appropriate sampling strategy: (a) alignment with conceptual framework, (b) sizable for sufficient data, (c) ability for inferences, (d) ethical sampling, (e) feasible plan for sampling, (f) transferable conclusions, and (g) efficient schema (Palinkas et al., 2015). This study's participant criterion was limited to homogeneous respondents with expertise and retail experience in the local geographical area. Therefore, I used a purposeful sampling to acquire my study's population. Purposeful sampling is a method of selecting study participants based on their knowledge, verbal assignment, and relation to the research topic (Gentles et al., 2015). Purposeful sampling, widely used in qualitative research, consists of homogenous participants to reduce variation in data (Palinkas et al., 2015). A purposeful sampling strategy is optimal for describing or exploring distinctive characteristics in a setting although not transferable to the entire population (Palinkas et al., 2015). This study was not transferable to the total population as it was limited to a geographic area and small businesses.

Typically, qualitative research employs small sample sizes (Gentles et al., 2015). In qualitative research, data will reach a point where the information becomes repetitive and superfluous thereby advocating for small samples that are sufficient and rich in

descriptions (Malterud et al., 2016). The criteria for selecting the sample size is the determination of breadth of contact needed to gain sufficient data that is complex, in-depth, varied, and in the appropriate context (Gentles et al., 2015). As the qualitative research purpose is not to generalize, a small sample is sufficient for in-depth and meaningful responses. Furthermore, when a study's participants possess a wealth of knowledge in the area of focus, a small number of participants can yield acceptable results and data saturation (Malterud et al., 2016).

Multiple cases in a case study can improve design rigor and stave off researcher bias (Anderson, Leahy, DelValle, Sherman, & Tansey, 2014). One prior qualitative study showed a sampling of six individual interviews was adequate for data saturation, particularly within a homogeneous group (Malterud et al., 2016). Gentles et al. (2015) advocated for four to 10 cases indicating that more than 10 cases are difficult to process while less than four does not adequately encapsulate the phenomenon. Stavros and Westberg (2009) used a sample size of six employing a purposive sampling model to examine CRM in sports organizations. With this multiple case study, I collected data through four sources or interviews from four separate businesses, as well as, document review for data saturation. Malterud et al. (2016) explained a prior study of teaching professionals reached data saturation with six to 10 participants. This case study's participant pool was four organizations and the leader(s) or manager(s) within the organization.

Data saturation is essential, particularly for a qualitative methodology, as it advances validity and credibility of the study (Hussein, 2015). Data saturation is the point

at which the researcher reaches a stage of redundancy in data (Gentles et al., 2015). Data saturation is crucial in qualitative research (Palinkas et al., 2015). To ensure data saturation, I employed the within method of triangulation by using individual interviews and document review as separate techniques to collecting and corroborating data. Elo et al. (2014) recommended collecting and analyzing preliminary data early in the process to search for replication in data categories and themes. The primary indicator of lack of saturation is a lack of replication and ability to group data and themes (Elo et al., 2014). In the event, I do not reach data saturation after the initial interviews, I sourced more participants that were qualified and continued to collect data via interviews until I reached data saturation.

I chose participant organizations based on the following criteria: (a) successful marketing strategies using the DeLone and McLean framework, (b) 100 employees or less, (c) physical selling location and online selling website, (d) establishment older than 5 years, and (e) EC sales equal or projected to reach 25% or more of total revenue. The size criteria are according to the SBA's (2016) definition of a SBE as a business that employed 500 or fewer workers and received \$7.0 million or less in goods. Additionally, selling trends of EC indicated a growing industry that is projected to reach 25% of total retail sales in the United States (Hortaçsu & Syverson, 2015). For this study, the criteria for sales revenue was a minimum of 25% sales in EC. It is critical to select suitable interviewees for applicable data return (Guest et al., 2017). Stavros & Westberg (2009) in their study of relationship marketing in sports organizations, made contact first with

senior marketing employees to have an initial discussion about the study and to access the best pool of participants for the interview stage.

It is ideal to conduct interviews in a quiet, private room that the interviewee has chosen (Whiting, 2008). I conducted interviews at the place of business if this was most convenient for the interviewee and free of distractions. In the event, the place of business was not free of distractions; I offered to conduct the interview via telephone or in person at a local library. When there are interruptions or distractions, additional time outside of the conventional period is appropriate (Whiting, 2008). I allowed up to 120 minutes for face to face or phone interview. A structured interview is traditionally face to face, by phone, or the Internet with a 30- to 90-minute time frame procedure (Petty et al., 2012).

### **Ethical Research**

In research, a fundamental tenet in ethical principles is the transparency or full disclosure of all information about the study and its participants (Vanclay, Baines, & Taylor, 2013). Doody and Noonan (2016) explained an important principle of ethical research is respect for persons, which includes treating the population as autonomous agents, ensuring confidentiality, and administering informed consent. It is advisable to provide a leaflet or letter explaining the details of the study and requirements for participants (Doody & Noonan, 2016). Further, consent retained for several years after the completion of the study is advisable (Vanclay et al., 2013). I collected data in an in-person format, which required a completed written consent form for all participants. The final doctoral study Walden IRB approval number was 07-14-17-0568683.

Vanclay, Baines, and Taylor (2013) developed a general practice guideline for ethical research, which included a position that researchers are obligated to convey participation in research as voluntary, as well as, reveal consequences associated with participating. Participants have the right to withdraw which is consistent with voluntary participation (Vanclay et al., 2013). Participants can withdraw by e-mailing or telephoning me. I provided a contact telephone number and e-mail address in the event participants elect to withdraw. The withdrawal information was available on the consent form copy provided to the participant before the interview process began. In the event participants withdrew from the study, the data collected was removed from the analysis (Vanclay et al., 2013). I took steps to remove the participant's transcripts from the data pool and deleted from the NVivo tool. Doody and Noonan (2016) clarified researchers must keep a record or traceable account of participants in the event, the participant requests withdrawal from the study. Participants did not receive an incentive for participating in the study as explained in the consent form.

According to the Belmont Report's principles for research, I must guarantee beneficence and minimize harm. As the principal researcher, I needed to have a protocol in place to ensure no harm, danger, or adverse consequences to participants. I fully informed participants of all possible risks associated with participation in the informed consent form. Doody and Noonan (2016) and Vanclay et al. (2013) explained the researcher must provide details on benefits and risks associated with the study to ensure a reasonable commitment to non-maleficence. Further, in the event of emotional distress; the researcher must provide a resolution (Vanclay et al., 2013).

Data must be secured and safe from unauthorized access for a fixed timeline (Vanclay et al., 2013). I will maintain data in a safe, secure location for 5 years to ensure anonymity and confidentiality. Further, to ensure confidentiality, Doody and Noonan (2016) expounded the researcher must specify the use of data coding while still maintaining a degree of anonymity and privacy. There should not be a link to participants nor should the information be divulged later (Whiting, 2008). Therefore, to protect the names of individuals, I abbreviated names of the interviewees or assigned numbers for identification to the businesses.

### **Data Collection Instruments**

In qualitative studies, the researcher is the primary collector and interpreter of the data (Sanjari, Bahramneshad, Fomani, Shoghi, & Cheraghi, 2014; Sinkovics & Alfoldi, 2012). I was the primary data collection instrument. A researcher in a qualitative study is essential to the context of the message delivered and ultimately the results of the study (Collins & Cooper, 2014). Thereby, Cronin (2014) revealed skills for an investigator in a case study design must be free of preconceptions and possess interpretive skills that are adaptive, and responsive to incongruent information. For this study, a semistructured interview was also the data collection instrument. Semistructured interview questions are direct, open-ended inquiry for the purpose of an in-depth, detailed description (Whiting, 2008). The semistructured interview technique is appropriate for this study because the technique allows for flexibility as updates or new data emerges during the process (Baškarada, 2014). Document review is an alternative or complementary method for collecting data. Bowen (2009) defined document analysis as a procedure for evaluating

physical and digital materials for gaining an understanding of the phenomenon.

Document review for the purpose of analysis is appropriate when researchers seek to review an organization's operational functions and success in the market place as elucidated in annual reports, newsletters, meeting minutes, staff reports, and memoranda (Owen, 2014). I used the data collected from the interviews and documents to organize into themes based on the literature and conceptual framework to highlight trends in marketing strategy. To enhance study dependability and credibility, member checking, triangulation, and audit trails are critical (Carter et al., 2014). I created an audit trail to accurately describe my data collection process for study credibility and ease of replication.

The interview protocol contains a detailed caption of the process for the interview (Appendix A). I used a checklist before the interview. Utilizing a checklist before the interview aids in the researcher's organizational skills and ensuring all areas are clarified beforehand (Whiting, 2008). I made a statement to interviewees that he or she has the choice during the interview to: (a) ask for clarification, (b) decline to answer a question, and (c) ask questions of me during the interview. I followed the five-step interview process as elicited by Whiting (2008): (a) building rapport, (b) apprehension, (c) exploration, (d) cooperative phase, and (e) participation. The interview process began with introductions and general conversation to establish rapport. As the researcher's interpersonal skills are significant, Collins and Cooper (2014) advocated for researchers to have certain attributes for quality interactions particularly in interviews including self-awareness, self-regulation, empathy, and social competence. I worked to exude these



qualities during the interview process. I explained the objectives of the interview and asked for permission to record the session and explained the use of the recording results in the final study. While there may be an initial period of discomfort at the apprehension and exploration phase, Whiting (2008) explained the use of a recorder promotes a relaxed environment because the researcher is free from note taking distraction to focus on communication with the participant.

My role as the data collector in this study required me to transcribe in-depth information in the appropriate context. To ensure accuracy, I used member checking. Carlson (2010) explained member checking is a process by which participants corroborate the researcher's data interpretation with their actual experiences. Member checking adds to the credibility of a study by ensuring the data and interview translation or interpretation is accurate and authentic (Varpio, Ajjawi, Monrouxe, O'Brien, & Rees, 2017). While Whiting (2008) explained member checking could incite further data if an interviewee adds to the transcript, but member checking still enhanced the reliability of the data.

### **Data Collection Technique**

Before the interview, I examined the organization's website using the three domains in the DeLone and McLean framework (see Table 2). I reviewed the online retail store to evaluate: (a) visual design for attractiveness, (b) system flexibility, (c) response times, (d) ease of placing and tracking order, (e) secure and easy payments, (f) quality of product information and pricing information and (g) website usability (navigation, speed, and consistency). After the initial screening to ensure the participant

met the qualifications for successful online marketing strategies, I discussed with the marketing manager or owner sales performance to access the final indicator of marketing success. The benchmark for marketing success is 25% of total sales revenue in online sales.

I created an audit trail to keep record of the research process. Data collection events including interviews, I documented in the audit trail with audio recordings and professionally transcribed reports. NVivo was an invaluable resource for maintaining an audit trail. I documented in NVivo data collation and queries to enhance study credibility. In the event, I needed to provide documentation of how I arrived at my study results, the audit trail in NVivo was an appropriate resource. Further, I kept copious notes of participant contact records, methods of contact, interview process, and member checking activity.

Next, I collected data using semistructured interviews. There were nine questions about marketing strategies, CRM, social media strategy, and target market characteristics (Appendix A). To enhance validity, I voice recorded, with the permission of the interviewee, the entire interview. Sanjari et al. (2014) reported recording findings for reliability and validity is advisable. I used generic identifiers for the participants to maintain confidentiality. The length of the interview had a time allotment of 120 minutes. I outsourced the transcription of the audio recording of the interviews. The transcriber signed the confidentiality agreement before transcription took place. If the transcribing is inaccurate or not readable, this will pose a problem and could damage mutual agreement on final data or results (Carlson, 2010). Member checking is significant when using

coded themes because the participants can corroborate the accuracy of the researcher's themes, assertions, or synthesis of the interviewees' statements (Leech & Onwuegbuzie, 2007). Member checking documents typically contain sections from interview transcripts, interpreted fragments of interview statements, and synthesized narratives about emerging themes or patterns (Carlson, 2010). I forwarded to interviewees clean, refined synthesized narratives from the interview transcript for ease of review. Carlson (2010) advised against sending entire interview transcripts to participants.

The key advantage of interviewing in a case study design is the method encompasses an in-depth understanding in a naturalistic context (Chan et al., 2013). Further, interviews are an acceptable method for reaching data saturation (Fusch & Ness, 2015). Significant disadvantages for interviewing are note taking errors and incorrect interpretation of interview. Interviews require rapid script; thereby, the possibility of incoherent notes or data in the wrong context is probable (Lincoln & Guba, 1985). I used NVivo for data storage and the analysis of transcripts, notes, and reports. Sinkovics and Alfoldi (2012) explained interview transcripts, market reports, and company documentation imported into the NVivo project file is an appropriate way to document the data collection path and guard against errors.

Bowen (2009) concluded the advantages of using document analysis were efficiency, availability, cost effective, exactness, and coverage. I can examine a wider span of time by reviewing the past and current documents. I can retrieve documents online or directly from the managers. I do not have to incur costs for gathering materials for data collection. The availability of online records is inexpensive, as well as, readily

obtainable. Lastly, documents will contain exact information including names, references, and events, which are advantageous for accuracy. The disadvantages of using document analysis included inadequate detail, availability of documents, and bias (Bowen, 2009). Managers selected as participants may reject imparting or sharing documents. The documents supplied may lack sufficient detail to register as useful data. Lastly, the documents shared are at the discretion of the manager and may not be useful for the study.

Member checking is the process of improving accuracy, credibility, and validity by allowing participant verification via clarification or error correction (Varpio et al., 2017). There are varying methods to employ member checking: (a) simultaneously while conducting the interview, (b) participant debriefing immediately after the interview (c) or at the end of the project. Lincoln and Guba (1985) in their seminal work advocated for member checking at the end of the research project whereas the participant verifies that the synthesis of the interview is an accurate representation. I used member checking after the interview process.

By e-mail, I conducted member checking. Houghton et al. (2013) advocated sending a transcribed copy to participants with an accompanying letter before initiating the analysis stage. Further, ensure instructions for member checking are precise and be precise about what to expect in the process (Carlson, 2010). I included in the consent form information about the member checking process and informed participants about the narration inclusion in the final study. The protocol I used for member checking included: conducting the initial interview; interpreting the participant's responses, and sharing with

the participant a written, e-mailed copy of my interpretation. The hard copy to participants was not the full transcription of the interview with word for word, colloquialism, or jargon but a polished document with thematic sections of synthesized individual responses. Carlson (2010) advocated for partial transcripts to avoid the distraction of mistakes or missteps and rather a focus on the main themes. After the interview with the participants, I followed up with a thank you e-mail and an attached synthesized summary of the interview responses (Appendix D). I asked the participants to respond within 7 business days with revisions or corrections to the Study Participant Response Record (Appendix E). By member checking with the study participants, I was able to verify my interpretation of the participant's interview data.

Member checking increases trustworthiness and rigor of a study because the researcher can assess the accuracy of synthesis and interpretation of statements with participants (Leech & Onwuegbuzie, 2007). Member checking allows participants to reflect and appreciate the data collection process (Cridland, Jones, Caputi, & Magee, 2015). Whiting (2008) advanced that while member checking is an opportunity to verify with participants, a disadvantage included participants generating more data post interview because of discontent with the way the interview wording came across.

### **Data Organization Technique**

Houghton, Murphy, Shaw, and Casey (2015) and Houghton et al. (2013) investigated NVivo for extensive qualitative studies and indicated NVivo was useful for managing, querying, and reporting qualitative data. NVivo, as Sinkovics and Alfoldi (2012), described is a computer-assisted qualitative data analysis software (CAQDAS)

tool to aid in managing the qualitative research process. Houghton et al. (2015) advanced that NVivo software is a useful tool for consistent coding schema, accurate interview transcribes, and precise pattern development.

I used the coding method, also referred to as constant comparison analysis, to organize my data for the subsequent query in NVivo. The coding method entails assigning codes based on objectives of the study, assigning to nodes, and subsequently, querying overarching themes (Malterud et al., 2016). Leech and Onwuegbuzie (2007) described coding as constant comparison analysis whereby, data sets with similarities assimilate into nodes for subsequent querying and analysis. In constant comparison, the process includes entering the sets of data, dissecting into meaningful sections, assigning each section to a particular code, and assimilating the similar codes to form groupings or themes (Leech & Onwuegbuzie, 2007). I used NVivo to assist with the coding, data assimilation, and comparison process.

I assimilated data into construct themed codes. Sotiriadou, Brouwers, and Le (2014) described the coding method as a process whereby the researcher indexes textual data by code and then collates words and phrases with similarities into nodes. A researcher must assign code definitions at the onset to ensure data assignment is with clarity and accuracy (Malterud et al., 2016). Sinkovics and Alfoldi (2012) advanced NVivo is substantial for collating primary and secondary sources in one place. Sinkovics and Alfoldi (2012) described two types of coding: topic and analytical. Grounded in the topics uncovered in the literature review, topic coding is suitable for construct themes. Analytical coding based on the theoretical framework is suitable for the latter stages of

analysis. I categorized attributes from the TOE framework and the literature review into codes. The three tenets of the conceptual framework were the nodes. The following narrative describes in detail the technique for data organization.

I created a project file to store all data collected over time including from primary and secondary sources. Data will be kept for at least 5 years in a locked, secured container, as required by Walden University. I password protected the NVivo file to ensure confidentiality. Initially, I created general nodes based on the TOE framework. Houghton et al. (2015) first created broad codes or nodes without structure. After importing interview data, Houghton et al. synthesized the data into child nodes for data organization and pattern recognition. After collection of the primary data, I categorized constructs by attributes for topic coding. Houghton et al. advanced coding in NVivo involved creating codes which were a categorization of themes, perspective, and roles. For my study, attributes for codes included organizational, environmental, and technological conditions. Houghton et al. explained NVivo nodes enable queries to search for patterns in the data. Varying queries include text, word frequency, and coding comparison. During the analysis phase, I queried for emerging themes.

### **Data Analysis**

I used methods triangulation utilizing individual interviews and document analysis for data collection. The transcribed data I collected from the interviews was loaded into NVivo. I also loaded PDFs, copies, or originals from the documents I collected for analysis as well. After transcribing interview notes and loading notes from the document analysis, I used the query function to highlight emerging themes amongst

the nodes. The emerging themes were comprised of contextual information grounded in the theoretical framework: technology, organization, and environmental conditions. Each construct of the TOE framework represented a node. The subsequent step in the analysis was recognizing emergent topics from the original topic codes. NVivo is significant for spotting trends and common themes (Sinkovics & Alfoldi, 2012). Cronin (2014) asserted researchers should look for categories and themes emerging and corroborate the data with the theoretical framework.

The analytical coding process, which is the final step, consisted of extensions of the original topic codes. The final analysis of coding was a composite output of theory and data (Sinkovics & Alfoldi, 2012). My focus was to distinguish new topics after the two-step coding process and query for patterns. The researcher must compare and recognize similarities between data themes and patterns and existing literature (Cronin, 2014). Sinkovics and Alfoldi (2012) explained the final phase is a corroboration of new data and literature with the original constructs and literature review. I analyzed the data for the correlation between the TOE framework and marketing strategies for SBE retailers selling in online markets.

It is critical for qualitative studies to demonstrate methods of data collection and institute a detailed audit trail for credibility (Cope, 2014). I used the following materials for research study audit trail: interview transcripts, recorded events in data analysis, and study process notes including dates and time stamps. By providing an audit trail, the ease of study replication is achievable.



## **Reliability and Validity**

### **Reliability**

Houghton et al. (2013) detailed a framework as introduced by Lincoln and Guba (1985) to assess the rigor of qualitative research: (a) credibility, (b) dependability, (c) confirmability, and (d) transferability. Dependability in qualitative researcher is the ability to transfer the same conditions and participants to studies that seek to replicate (Cope, 2014). A documented path with a rationale for each step increased rigor in qualitative research (Houghton et al., 2013). The ability for an external researcher to agree that each stage of the data collection is consistent and transferable to other studies is an indication of dependability (Cope, 2014). Further, an audit trail that details the research process and methodology used enhanced the dependability and confirmability of a study (Houghton et al., 2013; Lincoln & Guba, 1985). Materials used for audit trail included interview transcripts, process notes, and drafts of final analysis (Cope, 2014). I used an audit trail documented in NVivo to enhance dependability. I recorded in NVivo detailed notes of the data collection process. Further, Houghton et al. (2013) explained the NVivo record of decisions and coded themes would corroborate the researcher's analysis and results because the query of passages will yield the same results regardless of who reviewed the NVivo file.

### **Validity**

Credibility refers to the authenticity and accurate interpretation of the data. Houghton et al. (2013) and Lincoln and Guba (1985) explained continued engagement and persistent observation enhanced the credibility of a study. To promote credibility, I

practiced prolonged engagement in the field by committing to sufficient time with interviewees and document collection. Cope (2014) advanced it is important to enhance credibility by demonstrated engagement via observation. I used the triangulation of data via interviews, document analysis, and member checking to ensure study credibility. Member checking enhanced descriptive and interpretive validity (Leech & Onwuegbuzie, 2007). Member checking augments the credibility of a study as the researcher can share the interpreted, synthesized, contextualized data with the participants to ensure accuracy and credibility (Houghton et al., 2013; Lincoln & Guba, 1985). I spent sufficient time loading documents and reviewing coding in the NVivo software system. Sinkovics and Alfoldi (2012) asserted the use of CAQDAS software programs increased credibility. The use of qualitative software strengthens the computation and assimilation of themes (Leech & Onwuegbuzie, 2007).

It is the researcher's duty to deliver a research study that demonstrates applicability to society and transferability of the findings (Houghton et al., 2013). The seminal work by Lincoln and Guba (1985) described transferability as the ability to have similarity or congruence between two different studies. Cope (2014) explained a researcher's ability to illuminate a study's context and results as readily associated with other's experiences enhances transferability. Amankwaa (2016) discussed significant activities to enhance trustworthiness and promote transferability included: thick descriptions, detailed protocol, and detailed journaling. I provided thick descriptions with rich detail from the synthesized interview transcripts and document analysis. The transferability of the data is dependent on detailed descriptions (Houghton et al., 2013).

The detailed information should include accounts of context, direct quotes, and details of research methods. Further, an interview protocol enhances transferability. Cope (2014) explained providing information in the context of the research and the process in rich details is significant. I used an interview protocol as a pre-interview checklist and method for interview standardization. Moreover, triangulating data through various methods of collection for corroboration is significant (Bowen, 2009). Employing the use of multiple data sources for a case study advances the credibility and transferability of a study (Stavros & Westberg, 2009). Leech and Onwuegbuzie (2007) highlighted three methods for increasing rigor and trustworthiness in qualitative studies: utilizing more than one method for analysis, assessing the reliability of various themes, and member checking. By employing methods triangulation, I strengthened the reliability and transferability of my study. Further, I presented a vigorous presentation of findings by providing rich descriptions of the research context and processes for reaching study results.

Confirmability is the ability to illustrate the data responses without bias and in the appropriate context (Cope, 2014). Rich quotes and thick descriptions enhance confirmability. To increase confirmability, I used direct quotes from participants in the presentation of findings to corroborate study results. Ensuring confirmability includes audit trail, appropriate coding, clarity of responses, and lack of bias (Lincoln & Guba, 1985). I used an audit trail to enhance confirmability. Items included in an audit trail include interview transcripts, process notes, and drafts of the final report. The use of an audit trail in NVivo confirms the appropriate assignment of coding and theme schema (Sinkovics & Alfoldi, 2012). An external researcher should be able to use the text search

method to the review interview transcripts for important terms for code labels included in the study, as well as, use code query to search nodes for information. I kept detailed notes of the code assignment and query processes I incorporated to enhance confirmability.

The principal method for realizing data saturation is triangulation. Fusch and Ness (2015) defined data saturation as the inability to gather or uncover new information after using multiple data collection methods. I used interviews, document analysis, and member checking for triangulation and saturation of the data for this study. General guidelines for reaching data saturation include (a) study replication feasibility, (b) diminishing return on data, and (c) non-emerging codes or themes in CAQDAS (Fusch & Ness, 2015). The researchers suggested the use of a saturation grid or process notes, as well as, interview questions replication with multiple participants to reach multi-layered and elaborate details. I used the methods triangulation method for data saturation. Cope (2014) advocated for methods triangulation as an opportunity to gain a comprehensive view to reaching data saturation. Yin (as cited in Yazan, 2015) advocated for methods triangulation or multiple source evidence for case study design validity, thus methods is the chosen triangulation method for this study. Further, Francis et al. (as cited in Hennink et al., 2016), in a study on adequate sample size in qualitative studies, advocated for a model of 10 initial interviews and three additional when applicable for data saturation. I will continue to interview participants until saturation is reached as evidenced by no new emerging themes in the data.

### **Transition and Summary**

The purpose of this study was to explore effective marketing strategies that small store retail managers used to sell apparel and accessories in online markets successfully. Section 2 was a compilation of details regarding the participants, research design, data collection, and analysis methods. A rigorously documented path of the research process adds to the rigor and credibility of a study (Sinkovics & Alfoldi, 2012). In their seminal work, Lincoln and Guba (1985) explained that naturalistic inquiry is devoid of statistical analysis, nonetheless with appropriate techniques the trustworthiness and validity of the study is achievable. In Section 2, I have discussed in detail the process, as well as, methods for accuracy, validity, and data saturation. Section 3 includes details regarding the study findings, results of data analysis, applicability to marketing and retailing discipline, and implications for social change. I discussed in detail recommendations for e-retailing marketing strategies and implications for marketing managers.

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

#### **Introduction**

The purpose of this qualitative multiple case study was to explore effective marketing strategies that small store retail managers use to successfully sell apparel and accessories in online markets. The population for the research study included leaders from independent small online retail enterprises with brick-and-mortar stores located in the Central, Tri-Cities, or Southside areas in Virginia. Small retail managers often lack the knowledge on how to connect with consumers and build relationships (Verma et al., 2015). I collected data using semistructured interviews and documentation review. I employed member checking and methodological triangulation using document review to strengthen the study's reliability and validity. There were four participants including retailers based in the Central, Southside, and Tri-Cities areas of Virginia. Each participant sells apparel and accessories in physical stores as well as online via the organization's website. I verified that all participants have been in business over 5 years and online sales were equal to or greater than 25% of total sales revenue. Before the interviews, I examined each organization's website using the four domains in the DeLone and McLean framework (2016) which included system quality, information quality, user satisfaction, and usability. I reviewed the online retail store website to evaluate (a) visual design for attractiveness, (b) system flexibility, (c) response times, (d) ease of placing and tracking order, (e) secure and easy payments, (f) quality of product information and pricing information, and (g) website usability (navigation, speed, and consistency).

The conceptual framework guided the node assignment, which led to group formation and the recognition of overarching themes. In the process of assimilating data and thematic coding, five themes emerged from this study: price congruency, customer engagement, customer satisfaction, social media engagement, and organizational knowledge benefit. The findings in this study showed that e-CRM and SCRM tools, primarily social media networks, are a significant tool for CRM. In the following section, I discuss in detail my analysis and study findings of the five emergent themes: price congruency, customer engagement, customer satisfaction, social media engagement, and organizational knowledge benefit.

### **Presentation of the Findings**

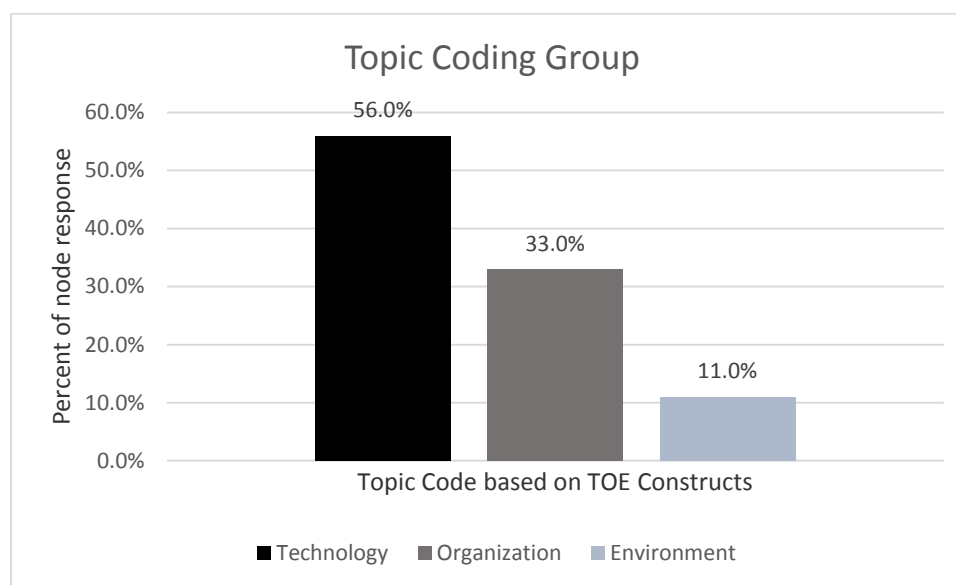
The research question for this study was as follows: What effective marketing strategies do small store retail managers use to successfully sell apparel and accessories in online markets? I used semistructured questions and document review for data collection (Appendix A). To enhance study validity and reliability, I used methodological triangulation. Archival documents for document review included billboards, online blog posts, newspaper advertisements, Facebook pages, Instagram pages, website review, promotional coupons, and promotional e-mails. I used NVivo for data organization, data coding, collation of themes, and audit trail development. I was able to identify observable patterns amongst the data based upon the theoretical constructs of the TOE. I attained data saturation through methodological triangulation of data through interviews, document review, and member checking. In this study, I reached data saturation with the

four participants as there was the replication of data and the ability to group data and query for pattern recognition.

To guide in my analysis of existing organizational characterizations that impact the degree of EC adoption and types of CRM strategies employed, I used the TOE framework. The findings of this study aligned with TOE by emphasizing that factors including technology infrastructure, top management support, business scope, employee and manager readiness, resource allocation, and external stakeholders are essential to effective EC processes and implementation of CRM marketing strategies. The technology domain included interview responses from the participants about marketing strategies including social network sites, website quality, manager and employee skill proficiency, and firm readiness. The organization domain topic code included responses regarding business scope, management support, data analytics, marketing orientation, and allocation of resources. The environment topic code included interview responses regarding external stakeholders such as customers and vendor partners.

Figure 1 shows in order of frequency the coded responses based on TOE constructs or topic nodes. Data indicated that, within the conceptual framework constructs, the technology domain yielded 56% of the node responses while organization generated 33% and environment 11% respectively.





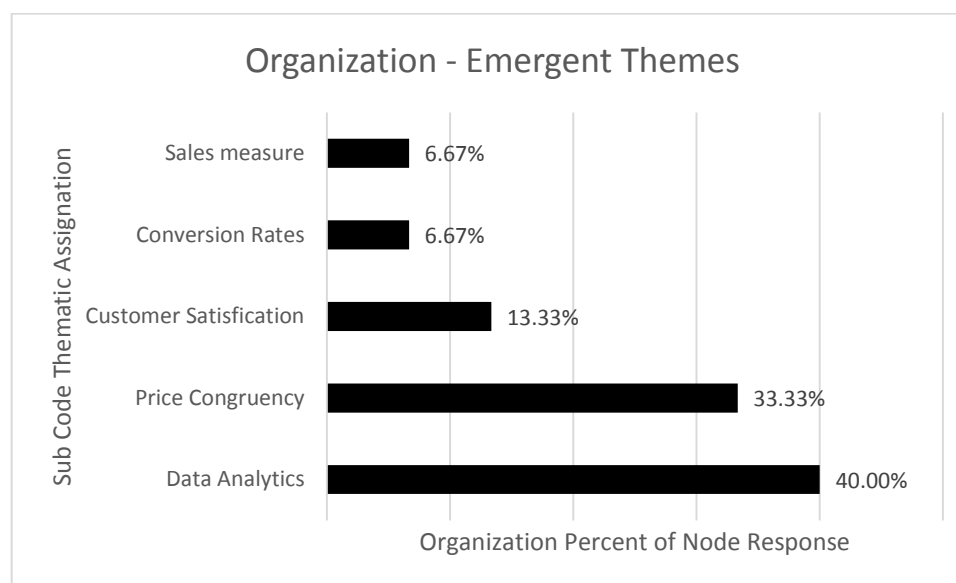
*Figure 1.* Coded node responses TOE framework.

The five major themes emerged from the analysis grounded in the TOE framework, the contemporary body of knowledge, and literature review; these included price congruency, customer engagement, customer satisfaction, social media engagement, and organizational knowledge benefit. The findings of this study uncovered significant tools for engaging customers, including SCRM practices. Social media emerged in this study as a tool for consistency in engaging customers and an inexpensive option. It is critical to institute cost-effective methods for reaching customers, particularly for small organizations with limited resources. SCRM is an innovative type of contemporary CRM tools and an effective tool for building relationships with customers in the online domain. The findings of this research also included that CRM extends beyond traditional strategies, including exceptional customer service and e-mail communication to incorporating digital tools for engagement and knowledge management. The use of digital tools yields useful data that in turn translates into knowledge about customers and

the ability to translate into effective business decisions. Cambra-Fierro et al. (2017) indicated it is not only important to adopt a marketing orientation but also CRM coupled with a concentrated focus on organizational knowledge management. The following section is a detailed narrative about the emergent themes and relationship with contemporary literature on CRM strategies in the retailing environment with a special focus on online markets.

### **Theme 1: Price Congruency**

Analysis of the topic code *organization* generated two predominant themes: price congruency and data analytics (Figure 2). The TOE framework organizational domain entails internal processes including firm resources and capabilities, management commitment, and strategic plans. Supply chain processes and management/owner decisions on pricing and inventory and CRM are significant in the organizational domain. The following is a discussion on two emerging themes in the context of strategic decisions by managers involving firm resources, constraints, and capabilities.



*Figure 2.* SBE organizational context emergent themes.

The first theme to emerge from participant interviews and document review was price congruency. Price congruency is the marketing strategy as determined by management to price goods in the physical location and website identically. Price congruency is significant to CRM practices because a consistent message enhances customer trust and improves the overall long-term relationship. P1 revealed in the interview, “In terms of the initial pricing, we absolutely are the same across the board and that's important of course... If the pricing is different, that's poor taste.” P2 explained, “Our website pricing has to be the same in-store—these vendors will not allow it.”

In the current literature, there was a discussion about the transparent nature of the Internet and how it has allowed consumers to dictate what price they are willing to pay and reveal their price sensitivity (Nisar & Prabhakar, 2017). Internet prices can change quickly because of consumer response and supply and demand (Gorodnichenko & Talavera, 2017). Chulkov and Nizovtsev (2016) explained price discrimination,

particularly third-degree price discrimination, which is a strategy that advertises varying prices based on targeted consumers groups that have different levels of price sensitivity, is common in online markets. As well, constant fluctuation in price can be a source of frustration for the consumer. Chulfov and Nizovtsev revealed results from a survey that consumers expect online prices to be similar for all buyers regardless of search engine activity or geographic location. Online customers often do not have the luxury of using coupons or negotiation to decrease price. When consumer trust is earned and fortified, customers are more likely to return as repeat customers (Oliveira, Alinho, Rita, & Dhillon, 2015).

The four participants of this study indicated that their pricing strategy was congruent between the physical locations and online. For example, P4 explained, "Pricing is the same for in-store and online." I observed through document review for P4 newspaper clippings for a specific product category promotion. One specific newspaper ad for P4 invited customers to visit the store or visit the website for purchasing. The three products featured in the ad were also available online at a certain advertised price. I was able to verify pricing online versus pricing in store in conjunction with numerous newspaper clippings. Price congruency was apparent. P3 indicated that their online product assortment matched the in-store inventory as well as pricing. I was able to document review the participant's website inventory and pricing information, which matched the in-store pricing. For example, a popular line of sandals was a key feature on the participant's website and prominently displayed at the entrance of the physical store with identical pricing information.

Pricing strategy is an upper management strategic decision and is significant to TOE in that SBE firms typically use less informal practices for marketing decisions (Hutchinson et al., 2015). The four participants in this study indicated that supply chain constraints and customer preferences drive pricing decisions. For example, pricing dictated by manufacturers and vendor partners was consistent across the four participants. In contrast to Hutchinson et al. (2015), strategic decisions regarding pricing were formalized as the directive from the supply chain players was clear. The vendors in the supply chain often dictated pricing. Sila (2013) illuminated that competitive pressures and network resources were significant to SBE manager's decisions regarding adoption of e-business practices.

Yoon and George (2013) explained competitive pressures between online and brick-and-mortar stores are significant. Thus, pricing is a crucial component to retaining and attracting consumers. Supply chain participants influenced marketing strategy decisions including pricing, website development, and promotional activity. All participants indicated that the vendor community's requirement to use manufacturer advertised pricing (MAP) often constrains retailers pricing strategy for national brands. For example, P1 responded, "We designate one of the pricing levels as the MAP pricing." P4 explained that for many of the national brands carried in the store, the vendor requires MAP. P3 explained that MAP pricing enables SBEs to compete with larger stores and online stores because pricing is compatible and competitive against third-party websites such as Amazon and eBay. MAP pricing strategy requires retailers to follow the vendor's minimum pricing requirement. Specifically, P3 expounded,

So many of our vendors may have what they call MAP pricing, manufacturers [minimum] advertise price... It's made it tougher in some respects because retail for years it was always two and a half times and that allowed you to do some discounting. Well, now 40, 50% maybe 55% on some stuff but that's it, and then they don't allow discounting other than if they're doing a nationwide promotion we can participate.... They can come in and pull their franchise so to speak. So MAT [MAP] pricing has made it a level playing field... We like MAT [MAP] pricing; we like franchises because it allows a store like us to offer those national brands in a small town and it will be a level playing field.

The result of this study is a successful strategy for online retailing for SBEs is congruency between the online store and in-store pricing. In the context of TOE, internal processes for SBEs including management commitment to the firm's capability to manage congruency between the online and in-store are significant to ensuring a consistent shopping experience between the two channels.

## **Theme 2: Organizational Knowledge Benefit**

The second theme to emerge from data analysis under the *organization* domain was derived from the child node *data analytics* to embody the concept of organizational knowledge benefit. Knowledge management is a source of competitive advantage and enhanced by the adoption of EC (Bharati, Zhang, & Chaudhury, 2015). It is beneficial to adopt EC for the benefit of knowledge management. Marketers have shifted from measuring brand awareness and trust to content-based online and digital programs with clear, measurable results (Spekman, 2015). Management's commitment to adopting EC

systems with quality websites and the use of third-party analytic tools for competitive advantage was consistent amongst the participants. Evidence of success since EC inception included proprietary information shared by the owners/managers in the interviews. P1 shared in the interview, “We’ve done quite a few sales.” P1’s sales were up since the release of the new website, and 33% of their customer base was now non-local thus expanding the scope of business with the organization on track to exceed \$100,000 in online sales. P3 shared since the inception of the new improved website and access to customer data that the online conversion rate of sales for the online store was 1.5 compared to industry standard of 1. P3 explained,

They tell me that it's 1% conversion - visitors versus purchases and I have a hard time wrapping my head around that because I'm so used to breaking more. If only 1% buy we're out of business but when I look at it by the month, it's right on it. We're 1.5 for this month.

In the context of TOE, a manager’s commitment of financial and HR to EC is significant (Chatzoglou & Chatzoudes, 2016). Adoption of EC benefits SBEs with crucial knowledge management systems that capture customer data via e-mail, social media, customer databases, the point of sale technology, and text messaging (Khodakarami & Chan, 2014). Data from organizational websites provide useful information on specific products, customer purchasing behaviors, and conversion rates. Navimipour and Soltani (2016) highlighted that technology not only aids in customizing communication but capturing purchase data, the performance of products, and other online behaviors. Regarding the effectiveness of implemented marketing strategies, all participants

indicated that data analytics was a key tool. A summary of the tools used by each participant is presented in Table 3. Google Analytics, a third-party vendor, was a consistent tool used amongst the participants. P1 uses data analytics service with Google Analytics for online website activity, as well as, third party vendors to track e-mail opens, e-mail unsubscribes, product link clicks and conversion rates. P1 explained,

The company we went with for the online store which is Big Commerce, they have an extensive analytics department. And we use Google Analytics. So for the online customer, we use Drip is our e-mail company... They track opens, unsubscribes, link clicks, and conversions. And the analytics on the website, they actually go as far as to tell you-- because they can track by product page. They tell you which product pages you're getting more hits on, versus which product pages you're getting more sells on, versus which ones are getting a lot of hits but no sells, or even ones that are converting most frequently. Almost a one-click equals one sale. They tell all that kind of thing in the analytics.

Among the participants, there were identical responses regarding measuring online success included online sales conversions, e-mail opens, and social media response rates (Table 3). In the context of TOE, the adoption of EC enables useful tracking customer activity and social media activity. The study findings are consistent with TOE literature in that, EC enables the retailer's ability to collect data about customers to personalize services or product offerings (Chulkov & Nizovtsev, 2016).



Table 3

*Coding of Participants' Response Related to Data Analytics*

Data Tool	<i>n</i>	P1	P2	P3	P4
Google Analytics	8	2	2	2	2
Online Conversion	12	1	8	1	2
E-mail Opens	20	8	9	1	2
Likes Assignment	19	2	10	2	5
Clicks	4	1	1	1	1

The use of social media is a source of insight into customer's preferences and opinions. Through document review of social media websites Instagram and Facebook for the four participants, I verified the frequency of social media postings. In a 25-day period, P2 posted 70 times on Instagram, which on average was 2.8 postings a day. P2 has over 2,100 followers; the typical posting garnered over 50 likes. When discussing measuring success on Instagram postings, P2 indicated that "It's a sliding scale because it's changed too. It's increased as we've had more followers, of course. So at one point, I was over the moon if we had 25 likes. Now if I have over 65 I know that it's a good post."

The opportunity for improved customer engagement is greater with digital tools that are measurable (Alford & Page, 2015). Organizations that adopt e-CRM have a competitive advantage for the data returned and opportunity for insight to make business decisions (Navimipour & Soltani, 2016). It is imperative to collect and manage data on customers (Harrigan & Miles, 2014). P3 uses a third-party website analytic application

service called *KIT* which the manager attributes to improved conversion rates for the online store. The manager/owner explained,

It's kind of cool. I'm not website savvy. It's [*KIT*] very good, it's very good....

This *KIT* will prompt me to say, "Hey, do you want to advertise a new long sleeve or something sell a shirt that you just put on." And it'll say, "One is yes, two is no." And I'll have to it just one, and then he'll put it on Facebook for me...

And *KIT* sends out thank-you e-mails to our website customers."

In the context of TOE, all participants in this study indicated there were strong management commitment and devotion of resources to EC and CRM processes before website implementation. P1 and P3 owners devoted a significant amount of resources to website development and paid for analytic tools for the benefit of customer data. TOE studies have indicated that upper management's support is significant to EC adoption and CRM strategies (Duan et al., 2012). In the organizational context of the TOE, Duan et al. (2012) and Lin (2014) explained upper management support was critical. SBEs managers or owners are more likely to adopt EC if the short-term benefit is readily reachable and recognizable (Duan et al., 2012). Contemporary literature such as a study by Sin et al. (2016) expounded that upper management support is significant when the recognizable benefit is increased sales, expanded market share, lowered costs, and viable relationship with stakeholders and consumers.

Management's commitment to resources for organizational knowledge benefit is consistent with Nguyen et al. (2015) and Akman and Mishra (2017) who indicated that top management support and technology knowledge of employees was necessary for the

organizational context. The study participants indicated that allocation of resources and upper managements support was significant to success implementation of EC and CRM systems. For example, P1 indicated that since the inception of their website the online sales had exceeded initial expectations. The success of the P1s website attributed to financial resources devoted to quality website building services. In P1's own words,

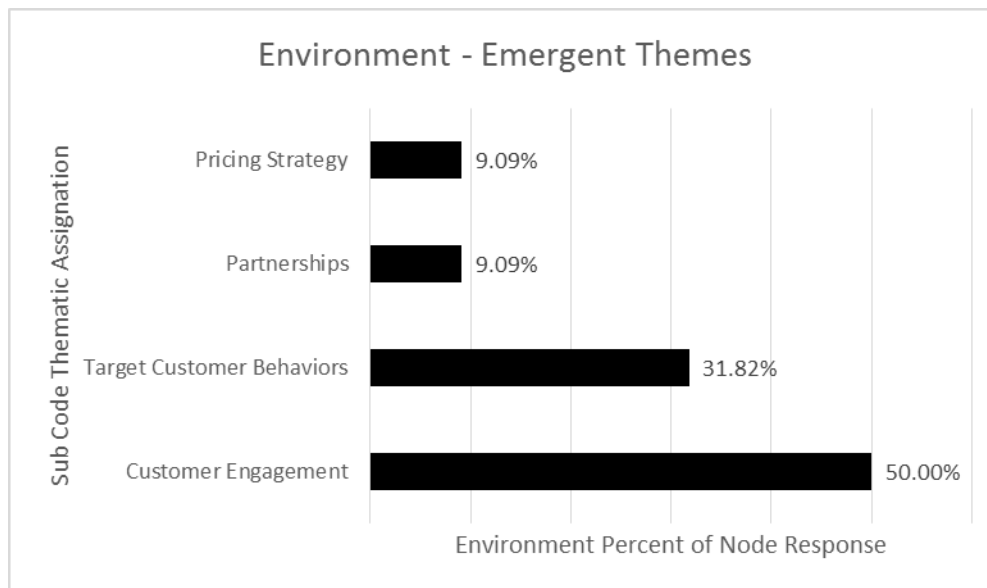
It's working pretty good. We've done quite a few sales. When I said 33% or about have been non-local which is kind of more than we expected at the time. We thought maybe it would just be in-store customers that didn't want to stop by, basically, but we've had California, Oregon, Montana, all different kinds of stuff and they're all just organic Google searches... we're looking to hit probably \$100,000... I think mainly it was the web development company that we used. We didn't skimp in that aspect of it.

P1 use of the verb “skimp” meant that the owner did not hold back in allocating resources to building a quality website and use of third-party analytic companies.

### **Theme 3: Customer Satisfaction**

Analysis of the topic code *environment* yielded two predominant themes: customer engagement and target customer behaviors (Figure 3). In the environmental domain of TOE, the environment's key players include customers, supply chain partners, and competitors. The external domain encompasses external foci that impact the business decisions an organization makes. For instance, Ciganek et al. (2014) highlighted that user groups or customers influence technology adoption decisions. The study participants engaged customers using the tools and communication styles preferred by the target

audience. The effective marketing strategies for the participants were contingent on the target market and the consumers buying behaviors and communicative tool usage.



*Figure 3.* SBE environmental context emergent themes.

The third emergent theme was customer satisfaction practices. The result of this study is that a successful strategy for online retailing for SBEs is ensuring customer satisfaction via website design and functionality and retention tools. There is a positive relationship between customer satisfaction and customer loyalty which leads to improved conversion rates and repeat customers (Nyadzayo & Khajehzadeh, 2016). Customer satisfaction includes website design, communication tools, and retention tools (Tolstoy et al., 2016). A customer's propensity to buy from a vendor relates to consumer trust of the online retailer and prior customer satisfaction experience (Oliveira et al., 2015). P3 responded when asked about strategies for maintaining customer relationships with a simplistic response "customer service." Customer satisfaction which positively impacts

consumer spending is a composite of some factors including perceived quality of goods, the perception of pricing, and online customer experience (Nisar & Prabhakar, 2017).

Website quality is significant for conversion rate as it facilitates an ease of use for the consumer and improved customer experience. It is important to ensure the website quality contributes to the trust relationship (Oliveira et al., 2015). A website's infrastructure is significant to consumer purchases decisions and subsequent feelings about the website. P1 attributes the success of their marketing strategies for online customers to management's investment in the initial web development. Through document review, I access that the website was easy to navigate and had filtering capabilities which are a component of the DeLone and McLean (2016) framework for quality websites. Further, via document review, I observed that P1 and P3's websites were of a superior quality and met the criteria for website attractiveness, ease of use, ease of placing orders, and secure payments according to DeLone and McLean (2016) standards (Appendix F). Since the launch of the website, P1's scope of business has expanded beyond the target region with 33% of sales revenue for the online market attributed to non-local sales in 2017. P1 shared that in website development the organization devoted resources to developing a quality product. In P1's own words,

It's almost detrimental for you to have a site that's harder to navigate because people might think you're just a dumpy place, and they don't want to even go look at it. Whereas, if it's very nice and well laid out, easy to find things on the website. The search and the filtering capabilities, we didn't skimp at all on that.

Harrigan et al. (2014) explained the need for search engine optimization and a highly functional website as tools for e-CRM activity for SBEs. P3 stated that the manager devoted resources to website creation via a third-party vendor and highlighted the improved online conversion rate. P3 linked the success of the conversion rate is a direct link to website ease of use and attractiveness.

Contemporary studies such as Elbeltagi, Hamad, Moizer, and Abou-Shouk (2016) study revealed American SMEs provided a competitive advantage with the adoption of EC by improved differentiation specifically enabling customers to improve customization of product and services and focused customer service. While customer service and support is a traditional strategy for CRM, the use of EC enhances the ability to take care of customer's needs. As Bhattacharjya, Ellison, and Tripathi (2016) illuminated customer-centric strategy linked with social presence is a vital element of customer satisfaction and loyalty. A social presence is an effective communication tool. Specifically, I observed through document review how participants responded to negative feedback online. P1 and P4 received bad reviews or comments on their social media pages, and both organizations responded within hours to control the rhetoric and protect brand reputation. In document review of the social media page for P1, a customer complained about an in-store customer service experience. P1's manager responded by inviting the customer back into the store for improved service and an opportunity to rectify the issue. Through document review, I observed the customer replied days later with follow-up posts that indicated P1 handled the situation appropriately and positively. During the 25-day review period, through document review, I observed P4 manager

posted a picture that offended some customers. P4 manager responded with a swift apologetic response to acknowledge the customers dislike of the image and explain the purpose of the image. Customers responded defending P1 and leaving positive messages. It was an indication of customer loyalty.

Retention tools used to retain current customers are significant to CRM processes and customer satisfaction (Nyadzayo & Khajehzadeh, 2016). Berry (2002) highlighted in *Relationship Marketing* that pricing services such as incentives, coupons, and frequent user perks were core strategies for relationship management. All four participants offered free shipping incentives over a stated dollar amount. P3 also offered coupons for returning customers who were members of the VIP club, and P4 instituted promotional group membership including Birthday club and Senior club designed to highlight special moments in customer lives. While the participants acknowledged that e-mail opens rates were challenged, tools such as discounts and free shipping were significant to customer retention and satisfaction. P3 shared, “On our website, we [customers] can sign up, we call it the VIP club you get a discount, and I think it's about almost 1300 people in that so when I do an e-mail it goes to those automatically. I try to do that about every 10 days.” P2 explained, “there's benefits there to e-mail sign-ups. We do send out coupons that way. Everything now, it's about exclusivity and making things catered so with an e-mail.” P4 shared that the open rate for non-promotional e-mails were 7% to 12% and 15% to 18% for sale e-mails.

#### **Theme 4: Customer Engagement**

The fourth theme to emerge from *environment* was customer engagement. Customer relationship building includes consistent customer engagement for fostering relationship and influencing future purchase decisions (Harrigan & Miles, 2014). CRM processes in the age of digital tools, EC, and mobile technology have transformed the way retailers engage consumers and are crucial for SBE competitive advantage (Llach & Alonso-Almeida, 2014). The participants were similar in customer engagement practices; however, the specific tool used for engagement depended on the targeted consumer's usage patterns. For example, P4 is an urban store located in a high-profile shopping area. The manager indicated the use of television commercials on the major local channels during the morning show hour was effective for reaching the mature target consumer. The manager indicated that morning shows including *The Today Show* and *Good Morning America* were optimal for prime television spots. Participants in this study employed traditional marketing methods for engaging customers. P3 relayed, "We use radio as our number one, deliver social media, very little other online advertising as far as web banners... And then we do print as well." P4 explained,

Radio is better in the summer because people are out in their cars. And TV tends to work better in the winter because people are home, but we use all-- it's true. We use all that stuff. Digital is consistent because it's inexpensive and it's direct.... I'm 60, so that's why I read the paper every day, newspaper. Not many of us left. But the newspaper, magazines, radio, TV, digital, social media, electronic billboards on the highway--sometimes brands give me money, and they like those



things because I'm talking to people on the highway going from Maine to Florida, right? So they're not just helping me, they're helping themselves.

Table 4 provides a comprehensive list of the CRM tools each participant used for customer engagement. The four study participants used e-mails to engage customers and keep them informed of promotions and new items available in-store or online (Table 4). P4 has over 40,000 customers on their e-mail listserv. The open e-mail rate for the organization's e-mails, 7% to 12% on full price and 15% to 18% on sale items, as P4 shared, "And as I understand it, that's better than average." Other strategies included birthday and senior citizen clubs for enhancing customer loyalty and repeat visits. Through document review, I observed P2, P3, and P4 e-mail letters or messages to promote new arrivals. P4's birthday club has a function that automatically sends an e-mail to include a coupon and personalized birthday message. P4 explained, "I think our birthday discount is unique. So that is definitely e-mailing them once a year with an exclusive coupon that is good all month long on all regular price merchandise for them to purchase at 10% off. I think our senior discount being all year round, not just a certain day of the week brings loyalty." Through document review, I observed P3's website promotes membership into the VIP club when visiting the website. A third-party vendor generates automatic replies to new customers for immediate response and engagement upon joining the VIP club.

Table 4

*Overview of CRM Tools Used*

Participant	CRM tools	e-CRM tools	S-CRM	Measure of Success
P1	E-mail Listserv	Online Coupon Free Shipping	FB, Instagram	Data analytics
P2	E-mail Listserv	Online Coupon Free Shipping	Instagram, FB	Likes on Social Media Conversion Data Analytics
P3	E-mail Listserv	Text & VIP Club Free Shipping	FB, Instagram	Data Analytics Conversion
P4	Birthday Club Senior Club Customer Database	Free Shipping	FB, Instagram	Data Analytics Conversion

In a study on electronic CRM for higher education institutions, the adoption of e-CRM enhanced customer relationships and improved organizational performance (Badwan, Shobaki, Naser, & Amuna, 2017). One of the participants has a VIP club with approximately 1300 participants. Their customers receive an e-mail every 2 weeks with a discount code. P2 explained that other successful methods for engaging customers included partnerships with bloggers, local restaurants, and cosmetic organizations. For one event, the retailer invited customers to share their experience with the organization by sharing photos online and using the hashtag to flag the event. P2 explained:

Partnerships are huge, especially in a market like [...] where you thrive off the locals. We just did a blogger event a couple of weekends ago.... We partnered with two bloggers and so then, regarding market reach, they're reaching out to

their markets, and they're bringing me, new customers. And they have blogger friends that they brought in, and their blogger friends took pictures and posted as well. So the event was a success.

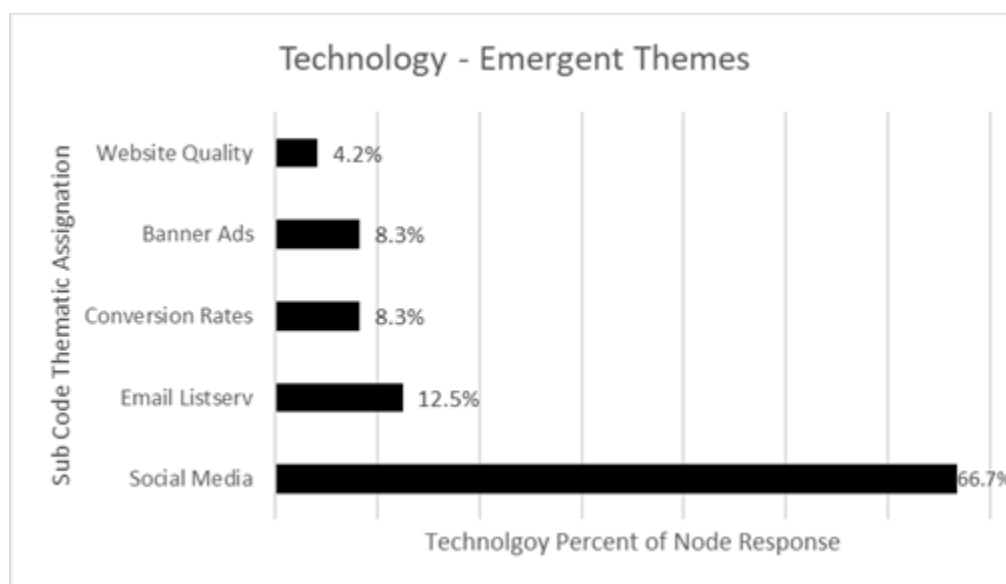
Customer's experiences through social gratification are significant to CRM success (Bhattacharjya et al., 2016). Social gratification motivations included social interaction, relationship building or maintenance, impression or aspirational behavior, personal and professional advancement, and discovery. In addition to traditional methods, participants used contemporary methods for engagement and social gratification including SCRM tools such as social media websites, blogs, and other online user communities. I observed through document review of the organization's online social sites, P1, P2, P3, and P4 primarily used Facebook and Instagram for customer engagement. P2 explained, "Instagram is powerful on a local level. Facebook is more powerful on a much broader level." P1 in the interview illuminated, "Instagram is a great one for us because we take pictures of the product. And you always get better, on Facebook especially, with pictures than just text." As Nisar and Prabhakar (2017) revealed, contemporary marketing strategies are shifting to more personalized consumer delivery.

SCRM tools enhance two-way communication channel between retailer and customer and provide a method for personalizing the interaction. The advent of the Internet has facilitated improved customer engagement, consumer interaction and information sharing between business and consumer (Armstrong & Kotler, 2015). An organization's customers are not only partners but also co-creators of the value

proposition as often communicated via social media tools (Shaqrah & Noor, 2017). The next thematic explanation is a discussion further of the growing trend among marketers to engage through social sites and blogs.

### **Theme 5: Social Media Engagement**

Analysis of the topic node *technology* yielded one predominant and significant theme: social media (Figure 4). Of the three topic nodes and subthemes within each node, social media emerged as the predominant coded response with a 66.7% frequency under the top code *technology*. Query of the node and its subthemes reliably included the subtheme social media as a significant strategy for engagement with customers.



*Figure 4.* SBE technological context emergent themes.

SCRM is significant in the realm of relationship management. The participants regarded SCRM as an essential factor to marketing practices as their targeted customers are active on social channels and use the tools consistently for two-way communication. The use of social media, for all four participants, was consistent. P1 said, “It's the

quickest, easiest way to stay in touch on social media” in contrast to sending e-mails. In response to strategies used to reach online customers, P2 and P3 answered “social media.” P2 highlighted “I find [it] important to follow our regulars and comment on their posts and their pages.” P2 indicated that using social media for connecting with customers was critical. P4 highlighted that when reaching online customers, “Our biggest is going to be TV and our e-mails and social media. We are not doing much radio right now.” Through document review of the 4 organization’s social sites, I found that on average the participants had on average over 1200 followers. P3 explained, “my Facebook followers are more than they [the local newspaper] have in circulation.”

Technology has enhanced the relationship and communication between buyers and sellers (Agnihotri, Dingus, Hu, & Krush, 2015). All four participants indicated that social media tools are a significant medium for communicating and engaging consumers. Through document review of the participant’s social websites, P2 has over 2200 followers on Instagram, P1 over 800 followers, P3 over 1500 followers, and P4 over 1000 followers. P2 explained “we have almost 21 hundred followers, which is really impressive to me. When we first started our Instagram page, I mean, it sky rocketed quickly and then it kind of plateaued. But then once we really started paying attention to what we were posting, what time, it went up even more.” Facebook, Instagram, and Snap Chat emerged as the primary methods for reaching consumers to communicate promotional activity, product updates, and engaging two-way dialogic communication (Table 5). The specific tool usage or success rate varied by the participant, as well as, based on targeted audience social media preference and usage behavior.

Table 5

*Coding of Participants' Response Related to SCRM*

Theme	<i>n</i>	P1	P2	P3	P4
Social media	36	12	7	7	8
Facebook	51	4	8	18	21
Instagram	67	4	32	4	27
E-mail	41	12	9	9	11
Snapchat	13	0	9	4	0

P1 indicated pictures are most effective on social media, while P2 explained pictures of live models was most effective in garnering likes, particularly on Instagram. P4 explained that posts about family activities and personalized posts were more effective than simplistic product-related posts. P4 indicated the organization used interns which were typically technology savvy to manage the social sites and offer suggestions for new strategies. P2 was hesitant about adopting Instagram; however, after testing the tool and using it consistently, the tool has evolved into their number one tool for customer engagement.

The participants in this study perceived social media as an economical method for reaching consumers. P2, a persistent user of social media, explained social media is the most effective method for reaching consumers; particularly at the local level. P2's use of social media, Instagram ranked Number 1 while Snapchat and Facebook were ranked 2 and 3 respectively. When describing the benefits of the top two ranking social media sites, P2 expounded "Snapchat is a bit more raw and more at the moment." Participants

revealed that Facebook was better suited for reaching a wider audience or expanding the scope of business, while Instagram was the primary tool for targeted engagement at the localized level. P2 explained “Instagram is powerful on a local level. Facebook is more powerful on a much broader level than Instagram or Snapchat’. Specifically, the strategy for Instagram posting included variation in postings to include quotes and pictures. The participants explained it was necessary to post with a frequency of three to four times a day or every 2 to 3 hours. P3 explained “Facebook I try to do at least three posts a day. I have found our customers are on Facebook in the mornings during coffee or whatever, lunchtime, and then 7 8 o'clock-ish when they're firmly sitting down, finished their dinner.” Pictures garnered the most “Likes” with models wearing apparel. P2 explained management initially was hesitant about adopting Instagram; however, the tool has evolved into the number one tool for customer engagement. P3’s owner/manager prefers Facebook and Instagram and does not understand Snapchat, nor do they use Twitter or Pinterest.

For document review, I connected with each participant on the social media channels the organizations revealed were the primary tools for engagement. Through document review of social sites for each participant, I verified the frequency of social postings. P2 illuminated it was “important to follow our regulars and comment on their posts and their pages. We really encourage our customers to repost pictures of themselves... it’s like being a rock star.” Through document review, I observed customer’s posting pictures of themselves in items bought from P2’s store. For example, a customer’s posting of herself at a wedding garnered close to 100 likes which were

above the average like assignation on a weekly basis. Customers are effective messengers of an organization's value proposition (Shaqrah & Noor, 2017).

Nisar and Whitehead (2016) explained content on social sites should be engaging by way of support of a product, news about a product, supplementary documents, and consumer reviews. P2 posts pictures on Instagram and Facebook throughout the day of new offerings or lifestyle related verbiage. I observed two-way conversations between the retailer and consumers. There were numerous posts throughout the day to keep the customer engaged and as a method to inspire conversion to a sale. P3 posted multiple times throughout the day and used social media to promote key promotional events such as the organization's 25th anniversary. Further, a local patron experienced loss in their family P3 used social media as a method to express sympathy and support for the local family. The engagement was noteworthy as P3 is in a rural, tight-knitted community. P4 used social media to post a minimum of once a day. I observed that P1 and P4 used social media to protect brand reputation and address negative comments. P2 explained, "I try to post every 2 to 3 hours.... variety is important... I'll do something motivational or inspirational."

P2 and P4 indicated the use of pictures on social media garnered more likes assignation which is an indication of the popularity of the posting and potential reach to other consumers. P2 was the heaviest user of Instagram which is a newer social media tool (Table 5). P4 revealed:

[I have a] love/hate relationship on Instagram because they want to know you.

And it's tough because you're supposed to have anonymity for your social media,



but at the same time on Facebook when I post a family picture we get 200 likes.... So it's a pull between building that story and showcasing the product. And I'd say 75% is showing a product, but I make sure to always tell a story. I don't post too many products without a story involved.

CRM activities are profitable and enhance customer attraction, retention, and lifetime value of the business (Wang, Cavusoglu, & Deng, 2016). Contemporary CRM activities range from traditional methods including paid media to owned online sites for engaging customers. Williams, Ashill, and Naumann (2017) implicated in their study that contemporary literature on CRM should move beyond descriptive or advocative but to a contextual discussion. The study participants revealed there was a mixture of CRM tools used to attract and retain customers in online markets and brick-and-mortar locations.

Ahani, Rahim, and Nilashi (2017) in a study on SCRM for SMEs study advanced social media was a cost-effective tool for CRM and for managing consumer relationships. Harrigan and Miles (2014) highlighted the significance of e-CRM activity with the integration of social media and marked it as one of the most effective tools SBEs can utilize to build successful CRM. P4 shared, "Digital is consistent because it's inexpensive and it's direct." While P3 shared, "Facebook is free unless I boost the post... we can boost every post for \$5, and it's cheaper than a newspaper ad."

Changes in consumer behavior habits have changed marketing strategies and methods for reaching consumers (Chosin & Ghaffari, 2017). Over 70% of all CRM efforts by businesses are deemed a failure for varying reasons including lack of management support, lack of employee support, and lack of infrastructure or processes

(Williams et al., 2017). Contemporary literature espoused views that correlated with the findings of this study. For example, Schultz and Malthouse (2017) explained traditional marketing communication with the advent of digital and interactive tools precipitated the transition of communication techniques. Each participant in this study ranked social media as a primary tool for engaging customers and communicating. In current markets, customers, media, and marketers interface and interact continuously via e-CRM tools. Customers are in control of limiting information disseminated to them, as well as, seeking out marketers for interaction. P2 and P3 continuously interacted with participants via Facebook and Instagram by posting three times a day morning, lunchtime, and after 7 pm. P2 asserted “consumers are hesitant about receiving e-mails because they are bombarded, and companies sell information” thereby social media is a more effective tool.

Each participant in this study continued to employ traditional techniques for reaching consumers; however, as Schultz and Malthouse (2017) asserted traditional marketing techniques are likely not to have a successful outcome on brand value and customer equity in established and emerging markets, particularly, where many consumers are heavy technology users. P2, an organization whose target market comprises of millennial and generation X customers, employs more e-CRM and SCRM tools than traditional paid media. While P1, P3, and P4 whose target customers comprise of baby boomers, must employ a mix of traditional marketing tools balanced with contemporary SCRM and e-CRM methods. P4 shared:

We definitely have a consistent voice on our Facebook and Instagram. My Instagram person is actually-- seems to be more of a mom; then my Facebook seems to be more of my older demographic. They're both definitely women-gear, but it seems like on Instagram, when I post stuff for little girls, little boys, mom-related, they dig it, much more so than when I post on Facebook. On Facebook, it's more of my 50- to a 65-year-old woman. But they're the ones that don't know as much about Facebook, so they're sharing everything I post, and I love it.

In the context of TOE, for technology and an organization's internal capabilities, technical expertise, adequate capital, and organization planning are areas of consideration. To benefit from SCRM adoption, SMEs need knowledgeable staff (Akman & Mishra, 2017). Study participants financial and HR are essential for successful implementation and monitoring of systems that generate consumer data for knowledge management. P4 revealed, "A girl that worked for me for a couple of years, and she'd had ownership of all the Instagram, and she was posting multiple times a week." While P2 indicated "I always had one of the stylists do them [social media pages]. It was ownership of them, just so that they have control of something in the store. But the last stylist we had, I learned a lot from her."

The findings of this research study indicated traditional CRM strategies coupled with e-CRM and SCRM is an effective technique for reaching new and established customers. Each participant revealed that SCRM tool Facebook was effective for expanding the scope of the business and acquiring new customers outside of the

geographical area, while SCRM tool Instagram was effective for engaging local customers on a regular basis. As one interviewee revealed social media tools such as Facebook's paid boost is cheaper than purchasing a newspaper ad and reaches a broader audience (P2). The adoption of EC and CRM is critical to competitive advantage for SBEs (Llach & Alonso-Almeida, 2014; Elbeltagi et al., 2016). The four participants revealed in their interview responses and the organizational documents that a mixture of traditional marketing strategies mixed with social and electronic tools are the appropriate assortment for marketing communications.

The findings from this study presented effective business practice for retail stores operating in online markets. The mixture of traditional marketing tools, including paid media such as radio, mass distributed flyers, and billboards, and SCRM tools, such as microblogs and social networking sites, prove to be effective mixtures for relationship building. For example, for P2 and P3 newspaper ads were ineffective. While P2 target audience of millennials is heavy users of technology including social media, P3 indicated that a poor response rate for paid newspaper drove to a decision to phase out the tool. While P1 and P4 considered paid ads on television and radio to be effective particularly for the promotion of special events, social media emerged as the top-rated tool for earned media and overall engagement. All four participants indicated that the area of significance for meeting the needs of consumers included social media. As Killian and McNanus (2015) developed in their study, the four effective social channels included video sharing, social networking, microblogs and image sharing. The four participants use three of the four channels which included social networking, microblogs, and image

sharing. The top channels in social media included Facebook, Instagram, Twitter, and Snapchat which incorporate microblogging and image sharing (Table 5).

### **Applications to Professional Practice**

The findings of this study add to the body of knowledge about CRM in online selling environments for SBEs. The following discussion is a detailed narrative of application to professional practice based on findings from participant interviews and document submissions. EC is necessary for business survival because adoption of the technology as a business strategy improves a business's potential to expand its scope beyond local markets (Chatzoglou & Chatzoudes, 2016). In interview transcription, with EC adoption P1 expanded the business reach to West Coast clients while P3 explained its largest customer base beyond Virginia states on the east coast and Midwest. Long-term, CRM enables business continuity by building a loyal customer base and increasing customer satisfaction (Nyadzayo & Khajehzadeh, 2016). EC and CRM are critical to business longevity.

The most significant contribution to business practice may be SCRM is an essential and necessary tool for customer engagement and satisfaction. Small businesses managers/owners should adopt SCRM tools as a contemporary marketing method. The findings of this study include SCRM is a critical tool for CRM. A document review of the social websites used to engage consumers included P1 and P3 used Facebook primarily and Instagram secondary, while P2 and P4 used Instagram primarily and Facebook secondary. P4 shared about the top two social media sites, "I think Instagram is more communal where Facebook is more family." As highlighted in the theme social media

engagement, the study participants each adopted the use of social media sites as a marketing strategy for constant and cost-effective ways to engage customers. The study participants used the social channels for two-way conversation and opportunities to promote products. I observed in document review, P2 with over 2100 followers posted 5 days in a week with up to 3 times in a 25-day period on Instagram. P4 with over 6000 followers on Facebook indicated:

We've posted on Instagram like 700 times. Facebook is almost daily. Sometimes multiple times a day. So I would say I probably post on Facebook six to eight times a week on average... It's a pull between building that story and really showcasing the product. And I'd say 75% is showing a product, but I make sure to always tell a story. I don't post too many products without a story involved.

Adoption of SCRM for persistent engagement could enhance a retailer's competitive advantage (Nitu et al., 2014). The ability to expand the scope of the business is beyond just selling online but engaging customers near and far. Shifts in consumer shopping behaviors have contributed to a paradigm shift in marketing strategies. The advent of the Internet and EC has transformed consumer behavior. EC has met the needs of time-constrained consumers and consumers shopping for better pricing (Akbar & James, 2014). The shift in behaviors requires retailers to adopt innovative strategies to attract customers. The marketing mix for contemporary customers involves a consistent marketing message across varied channels of distribution and varied tools of promotion. The varied channels include brick-and-mortar locations as well as online sites while using promotional tools such as social media to improve the organization's value proposition

by inviting customers to be a part of the message. Bachmann and Kantorová (2016) in their study of central European medium and large enterprises found that social media was primarily used for customized communication and facilitating feedback, and monitoring of marketing campaign success.

The second application to professional practice is to adopt EC for not only added sales benefit, but to improve CRM performance and enhance knowledge management. As well, adopt SCRM for customer loyalty and equity for long-term benefits including competitive advantage and business lifespan. The adoption of EC enables CRM processes with the contemporary digital tools and data analytics available to improve customer engagement and other customer-centric marketing methods (Chulkov & Nizovtsev, 2016). P1 within the first year of online selling expanded the business scope along the Mid-Atlantic region with over 33% of non-local customers. P1 had reached a benchmark of well over 25% of its total revenue in online sells which the manager affirmed that “analytics part plays a very key piece in the decisions made.” This study’s participants used data analytics tools including Google Analytics, third-party e-mail service providers, and Facebook boosts for data return to make strategic decisions. Using a third-party vendor to monitor website activity and make recommendations, P3 attributed improved conversion rates which were above industry standards to the use of third-party analytic vendor KIT.

The third application to business practice is SBEs should adopt EC and CRM for data insight and organizational knowledge. As highlighted in the theme organization knowledge benefit, the findings of this study showed that SBEs should not only adopt EC

because of the competitive environment but also to improve relationship and knowledge management which is an advantage and antecedent to longevity. Relationship management is critical to competitive advantage (Harrigan & Miles, 2014). In a monopolistic competitive environment such as apparel and accessory retailing, product and service differentiation is essential to competitive advantage. CRM is the service component and requisite for longevity and sustainability. For an organization that adopts a customer-centric marketing orientation, relationship management is a critical tool. EC, SCRM, and e-CRM provide data insight for making strategic business decisions. Findings showed that the participants that devoted a minimum of one employee to monitor the social media sites had recognizable indicators of customer engagement including “likes,” “hashtag,” store visits, and online sales conversions. Digital tools including data analytics systems provide a more rigorous discernment into consumer habits and preferences, while social media provides useful data on engagement. E-CRM improves customer relationships, information for business insight, and competitive advantage (Navimipour & Soltani, 2016).

The fourth application to business practice is it is critical to understand the engagement behaviors and preferences of your target market thereby utilizing the right mixture of traditional and contemporary methods for CRM and marketing communications. For example, millennials are digital and technology natives; therefore, SCRM is an effective tool for this generation. For baby boomers, the generation is inclined to lagging adoption of technology; therefore, incorporating SCRM is important, but the tools should involve the established types as opposed to newer innovative tools



that are typically used by leaders or early adopters. The study participants were similar in their responses regarding promotional strategies in that the method is responsive to target customer communication and buying habits. For example, P2 described their primary marketing strategies for reaching customers as a range of tools including paid advertisements, google search optimization, Internet banner ads, Instagram, and Facebook. P1 uses radio and social media for reaching the target market. P3 uses newspaper and television. P4 owner summarized the use of different tools for reaching the target customer:

I think about two things. What do my customers want, and what do I have to sell? Really, that's what it's all about for any and everybody. And for anybody. It could be cars, could be shoes, could be insurance, and could be anything. What do I have to sell? What do my customers want? And then once I figure out who my customers are-- that's a very important thing-- then I try and make sure who my customers are. How do they receive things? If it's her, digital. If it's me, could be a newspaper, could be the TV news. So all that stuff depends on what you're selling, who you're selling it to. And then everything else feeds off of that. How do those people get their information, right?

SBE managers/owners should devise the appropriate mix of traditional marketing strategies with contemporary marketing communication tools online shopping is devoid of face-to-face contact thereby inhibiting the ability to build a relationship with customers. Customers that visit brick-and-mortar locations have the luxury of asking questions and experiencing customer service processes first hand. Online tools that

provide an environment for customer engagement supplanted the inability to connect with customers that used to visit the physical store. CRM's primary premise is to attract new customers and retain those that are loyal to the brand or organization. Findings of this study included the participants in this study recognized that marketing strategy has shifted to more of online engagement practices supported by traditional marketing tools. Navimipour and Soltani (2016) expounded that in a competitive environment enhanced CRM is essential and included tools such as (a) web-based customer service, (b) low cost with expedient delivery, (c) real-time services, (d) ease of use with the website.

In the context of TOE, there are internal processes to consider before EC adoption. For example, management support is critical to adoption and implementation of technology (Lin, 2014). The priorities mentioned above including adopting SCRM as a viable CRM practice and instituting knowledge management systems requires upper management commitment of financial and HR. For instance, P1 revealed that upper management devoted resources to ensuring a quality website for the organization. While P3 who was an owner initially used Shopify as a platform to sell online; however, the owner later decided to hire a professional third party to improve the website experience despite the costs. External processes include such as key stakeholders and meeting their needs translate to making strategic decisions on what CRM tools to use. Owners/managers must decide what target audience and key supply chain players restrictions or constraints require.

### **Implications for Social Change**

The implication for social change includes the potential to improve the life cycle of SBEs in smaller communities which improve community entrepreneurial and startup success. Entrepreneurship contributes to community vitality and economic prosperity by providing employment, skill development, and job training (Council on Virginia's Future, 2017). Successful entrepreneurship in Virginia's communities as well as across the country has a positive impact on the community and its citizens. This study was not only a focus on marketing strategies but also the potential to provide SBEs in the Central, Southside, and Tri-Cities areas of Virginia with ideas for long-term sustainability. In the United States, half of all new startups survive beyond 5 years (SBA, 2016b). SBEs in the United States contribute significantly to job creation and gross domestic output. It is essential to provide SBEs with the tools for long-term survival in communities that are below the state average in entrepreneurship and business start-ups.

Startup rates since the Great Recession have trended downward across the country (Council on Virginia Future, 2017). Factors including slowing economy, access to capital, debt obligations, and tax regulation are issues impacting start-up efforts. There is a need for new businesses and innovation amidst low survival rates. Virginia ranked 21st in the country for new start-ups with a growth rate of 9.5% compared to 10% nationally (Council on Virginia Future, 2017). Specifically, in the Southside region of the state, startups were 21.0 per 10,000 residents compared to 17.0 for the Central region (Council on Virginia Future, 2017). In 2014, SBEs contributed over 26,000 net new jobs in Virginia with 46.9% of employed citizens working for SBEs (SBA, 2016a). In Virginia,

SBEs with less than 100 employees are the largest share of SBE employment. The Southside area of the state has one of the highest unemployment in the state above 5% attributed to the loss of manufacturing jobs and limited economic growth. The Central region's unemployment is similar to the state rate at 4.0%.

Community vitality through job creation and business sustainability is critical to community well-being. Promoting entrepreneurship, innovation, and startup growth improve the quality of life of residents. Communities in Virginia, for example in the Southside region, poverty levels rose in 2014 compared to the rest of the state with the highest rate of 20% (Council on Virginia Future, 2017). A community that has a lack of economic opportunity correlates with poverty rates. Entrepreneurial ventures and long-term business stability improves employment and contributes to net new job creation. This study aimed to provide tools aimed at improving apparel retailer's lifecycle.

### **Recommendations for Action**

The findings of this study provide insight into marketing strategies to employ that are practical and applicable to SBEs. The emergent themes price congruency, customer engagement, customer satisfaction, social media engagement, and organizational knowledge benefit are concepts that extend the discussion in the discipline concerning marketing strategies for SBE online retailing. In a study on a successful retailer with over 18 years experience selling in online markets, Thompson and McLarney (2017) devised a road map of strategies for retaining competitive advantage in a highly competitive environment. The competitive environment was volatile and dynamic in that numerous changes had occurred in the short term including consumers preferring buying online;

retailers contending with lower margins; customers requiring same day delivery and in-store pickup options, and consumer increasing usage rate of digital channels for purchases. Thompson and McLarney (2017) concluded that a sustainable business model and marketing strategies for the clothing chain must include an online and digital presence, mobile applications including use of applications, improved delivery options, and strategy for overseas expansion. The context of Thompson and McLarney's study of the retail environment in the UK mirrors the U.S. retail sector. Extant conditions in the U.S. retail sector include: customers buying more online than in physical stores; digital tools growing in importance among customers; social media tools required for engagement; and saturated market of online sellers. The results from this study are parallel with Thompson and McLarney retail case study. I recommend the following for a small retailer operating or aspiring to operate in online markets:

The first recommendation is to adopt EC as a business strategy. EC enables improved customer service processes which in turn impact customer loyalty and long-term relationship building. Theme 1 price congruency contributes to customer trust levels and customer service expectations. The next recommendation is SBEs should adopt CRM as a marketing orientation. Theme 2 customer engagement improves with the appropriate CRM tools which in turn impacts customer loyalty. Further, the tools used to connect with the targeted consumer should apply to user behavior. It is critical for managers to devote resources, financially and employee wise, to CRM implementation and maintenance.

The third recommendation is SBEs should use social media faithfully as a tool for collaborative communication. For customers, social presence is a vehicle for positive experiences in virtual environments. Managers should devote resources to SCRM. Chosin and Ghaffari (2017) illuminated modern commerce methods are transforming as changes in consumer behavior habits change. Technology has enhanced the relationship and communication between buyers and sellers. The last recommendation is to adopt EC as a business strategy for instituting CRM which yields the benefit of organizational knowledge and decision-making. Theme 5 addressed the benefit of organizational knowledge. When adopting CRM as a marketing approach, Navimipour and Soltani (2016) highlighted that technology not only aids in customizing communication but capturing purchase data, the performance of products, and other online activities. Despite prior studies of the TOE framework and EC adoption, this study did not corroborate that organizational size is not significant; however, employee readiness, the devotion of resources to EC and CRM processes is significant. Social media tools provide readable data and up-to-date materials that are useful for SBE managers (Harrigan & Miles, 2014).

The recommendations of this study could reach beyond the state of Virginia. Through my research, I sought to reveal effective marketing strategies and CRM processes for business sustainability particularly in areas where communities lag in small business openings and survival. The Bureau of Economic Analysis's (2017) report on GDP by the state revealed that in the first quarter of 2017, the retail sector of the GDP decreased 3.6% nationwide. The GDP is a calculation sum of workers incomes, income earned by small businesses and corporations, and business taxes (Bureau of Economic

Analysis, 2017). The regions in the country experiencing the greatest decline in the retail activity included the Far West and Southwest (Table 6). The decrease in state GDP indicates retail goods and services bought and sold in the state during the first quarter of 2017 declined. Despite the decline in retail GDP, the U.S. retail growth in EC, which increased 15% in 2016, is an area of potential for retailers (U.S. Department of Commerce, 2016).

Table 6

*GDP by Retail Sector by Region*

United States	Percent in change In real GDP by region	Retail Trade
Alaska	1.8	-0.24
California	0.1	-0.28
Arizona	0.9	-0.47
New Mexico	2.8	-0.37
Oklahoma	1.9	-0.50
West Virginia	3.0	-0.48
Alabama	1.9	-0.33
Mississippi	1.3	-0.33

*Note.* Data retrieved from “Gross Domestic Product by State: First Quarter of 2017”, Bureau of Economic Analysis. 2017

Table 7 provides details of the retail GDP decline for the lowest eight states in the country. States that would benefit from this study, where the decline in retail sector GDP is the greatest, include West Virginia, Arizona, and Oklahoma.

Table 7

*GDP by Retail Sector by State*

By State	Percent in change In real GDP by state	Retail Trade
New England Region	0.9	-0.17
Mideast	0.7	-0.16
Great Lakes	1.4	-0.22
Planes	-0.9	-0.22
Southeast	1.5	-0.22
Southwest	3.3	-0.23
Rocky Mountain	0.9	-0.17
Far West	0.5	-0.25

*Note.* Data retrieved from “Gross Domestic Product by State: First Quarter of 2017”, Bureau of Economic Analysis. 2017

I plan to share the results of my study through various channels for dissemination. I intend to publish my paper in a peer-reviewed journal after the final defense and subsequent study approval. I will vet conferences that have a retail focus for possible paper presentations. Further, for my participants, I will share an annotated version of my results of the study and recommendations for the participants. I will invite study participants to discuss further recommendations for business practice. I will share my research in the higher education classes I teach at local colleges including John Tyler Community College, Virginia Commonwealth University, and Virginia State University.



I will share results with local Chamber of Commerce chapters; particularly the chapters in the Southside, Central, and Tri-Cities regions of Virginia.

### **Recommendations for Further Research**

There are numerous limitations identified in this study which could serve as the basis for future research. The primary focus of this study was SBEs in Virginia communities. Future research could focus on larger enterprises in the same geographical area to observe marketing practices geared towards larger segments of the market. Further, as identified in Table 5, there are areas in the country that are experiencing greater declines in retail activity. Research, particularly in the Southwest and Far West regions of the country, is advisable to determine causes of the decline in retail activity and methods for reviving the sector.

A limitation of this study included interviewing only managers and business owners. The interviewee's responses to the interview questions may have biases towards the use of certain marketing strategies. The manager or owner may have aversions to certain types of tools for personal reasons. A future study could involve interviewing other employees in the organization for a comprehensive view as opposed to upper management only. Another limitation is situational factors. There are situational factors not addressed in the interview questions that may have an impact on the success of an organization's marketing strategies. For example, the interview questions do not address the usage rate of certain digital tools by customers. The usage rate could be a determinant of types of marketing tools a business should use for its target market. A study on digital tool use by generation, gender, or other demographic factors is a prospect. The second

situational factor not addressed in the interview questions is the competitive landscape and vendor influence. I did not evaluate in this study the impact or influence of external stakeholders. An opportunity for future research could focus on a correlation between external stakeholder's business practices and the impact on SBEs marketing decisions.

### **Reflections**

This experience has been a remarkable stage in my professional and educational career. I achieved the pinnacle of my academic career because of a rewarding research process. I had a few personal biases in place before the data collection process. Biases are an unavoidable phenomenon as prior experiences and cultural perspectives impact perception (Fusch & Ness, 2015). I assumed that social media tools and usage behavior were the same amongst the participants. While the social media adoption was similar, the varying options of tools varied based on the targeted customer. Also, traditional marketing tools are still relevant. Prior TOE framework studies indicated that organizational size was significant. The managers or owners I interviewed did not report store size was important rather than social media enabled them to be more competitive with larger stores.

I realized after data collection and analysis that while there has been a paradigm shift in marketing practices due to digital tools and the increased requirement for customer engagement, traditional marketing tools including paid advertisements, word of mouth, and publicity are still relevant. Customer preferences are the basis for the relevancy for each tool. Marketing managers must possess the wherewithal to determine when to institute each tool. Further, regardless of the size of business, small businesses

must institute effective marketing strategies and participate in online markets. Small businesses are still relevant in small communities and are a significant contributor to the well-being of community vitality and success.

### **Conclusion**

The purpose of this qualitative multiple case study was to explore strategies successful SBE managers or owners use to sell in online markets. Innovations, such as EC, have placed small businesses at a critical moment when pondering methods for long-term sustainability. The adoption of EC and CRM is critical to competitive advantage and long-term sustainability for SBEs. The adoption of EC is a foundation for expanding business scope while also instituting effective CRM strategies. Wang et al. (2016) asserted that latecomers to EC activity would experience more of a deterrent to barriers of entry and remain at a competitive disadvantage. Effective CRM strategies include adopting social media sites for consistent customer engagement and as an ancillary to customer satisfaction. The findings of this study are that marketing practices for SBEs in online retail markets must institute not only traditional strategies for customer loyalty and engagement but SCRM. It is significant for SBEs selling in brick-and-mortar or online markets to institute the most effective marketing strategies for maximum profitability returns and customer equity. Effective strategies for contemporary participation in online markets require an active social media presence. There are four recommendations for practicing managers of retail organizations operating or considering operating in online markets: (a) adopt EC as a business strategy; (b) adopt customer-centric CRM as a marketing orientation; (c) use social media as a collaborative tool for communicating

value proposition; and (d) use data analytics available via EC and CRM for strategic business decisions. The potential for positive social change from this study is the potential to aid SBE lifespan in smaller communities. The stability of SBEs is critical to the health of local communities as these organizations contribute significantly to the national and state GDP growth.

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## Appendix A: Interview Protocol

**Participants:** Prior to interview, participants will be selected based on the doctoral study criteria:

1. Documented marketing strategy success with online website selling apparel and accessories
2. Classified as small business with less than 100 employees
3. Brick-and-mortar location in Central, Southside and Tri-Cities areas of Virginia
4. Business is 5 years old or older
5. Twenty- five percent of total sales in e-commerce, verified with business owner

**Questions:** Nine questions about marketing strategies, customer relationship management, social media strategy, and target market characteristics and details

**Location:** I will conduct interviews onsite at the store or manager's home office location or via telephone if a space conducive to no distractions or interruptions is not available.

**Audio Recording & Transcription:** I will voice record the interview and write notes during the interview. After review of the notes and voice record, I will use the Livescribe instrument to transform my written notes into digital content. I will forward the transcribed synthesized notes of the interview for member checking to the interviewee within 1 week of the face to face interview. Member checking will be conducted via email.

**Length of Interview:** Each interview will have a time allotment of 1-2 hours.

**Checklist:**

1. Share objectives of interview
2. Ask for permission to audio record the interview and reason for recording

3. Share with the interviewee, that he or she has the choice to ask for clarification about a specific question
4. Share with the interviewee that he or she has the choice to decline to answer a question
5. Share with the interviewee that he or she has the choice to ask questions of me during the interview
6. Reiterate confidentiality
7. Share time frame allotted for interview

#### Interview Questions

1. How would you describe your target market for both your physical location and online website?
2. What marketing strategies have you used for both the goods and services you market to your target customers online?
3. What strategies do you use to establish and maintain relationships with your target customers in store and online?
4. What are your pricing strategies for the online store and the physical store?
5. What promotional strategies do you use for marketing to online customers?
6. What social media sites do you use to reach your target market?
7. What strategies do you use to reach online customers?
8. How do you measure the effectiveness or success of your marketing strategies?
9. Please share any additional information pertaining to marketing strategies for your store that were not covered.

## Appendix B: Interview Questions

1. How would you describe your target market for both your physical location and online website?
2. What marketing strategies have you used for both the goods and services you market to your target customers online?
3. What strategies do you use to establish and maintain relationships with your target customers in store and online?
4. What are your pricing strategies for the online store and the physical store?
5. What promotional strategies do you use for marketing to online customers?
6. What social media sites do you use to reach your target market?
7. What strategies do you use to reach online customers?
8. How do you measure the effectiveness or success of your marketing strategies?
9. Please share any additional information pertaining to marketing strategies for your store that were not covered.

## Appendix C: Invite Correspondence Letter to Participants

Greetings,

My name is Nikki Hicks. I am a Doctoral Student at Walden University conducting a study on successful marketing strategies used in the local retailing scene. I am contacting you because of your experience in retailing and working with online customers for your organization. This email is a formal invitation for you to participate in my study. My study will explore effective marketing strategies that small store retail owners and/or managers use to successfully sell apparel and accessories in online markets.

If you agree to be part of this research project, I would ask that you:

- Complete an approximate 1-hour interview
- Allow me to voice record the interview
- Allow me to review marketing and promotional materials and your social media websites (examples of marketing and promotional materials include: Advertisements, manuals, background papers, brochures, journals, event flyers or programs, letters, memoranda, newspaper clippings, press releases, radio/TV scripts, organization reports, survey data, conversion rates for social media pages sales, and conversion rates for website sales)
- A few weeks after the initial interview, review an interview summary for accuracy – approximately 30-60 minutes

I anticipate collecting data during the months of July and August. I will coordinate the exact times of data collection with you in order to minimize disruption to your normal business activities.

If you prefer not to be involved in this study, that is not a problem at all.

I am excited for the opportunity to interview experts that have experienced success in the local retailing scene. I would be pleased to share the results of this study with you at the conclusion. If you are interested in participating, please email me at XXXXX. I will schedule a day and time that is convenient for you to conduct the interview. I look forward to hearing from you soon.

Thank you for your consideration.

Sincerely,

Nikki Rhue Hicks,  
Doctoral Business Administration Candidate  
Walden University



## Appendix D: Follow-Up E-mail Thank-You and Interview Summary

Dear Study Participant,

Thank you again for agreeing to meet with me a few weeks ago to discuss marketing strategies you are using to attract and retain customers in your physical and online stores.

I am attaching a copy of the interview interpretation based on transcription of the audio file. Please review the attached file. If you agree with the interpretation no reply is needed to this email. I ask that you respond in 7 days if any changes need to be made.

Any questions, please feel free to contact me.

I sincerely appreciate your willingness to participate in my study. I will share my results with you upon final approval.

Best regards,

Nikki Hicks  
Doctoral Business Administration Candidate  
Walden University

## Appendix E: Study Participant Response Record

Dear Student Participant,

Attached is the transcribed file for your review regarding summary of the question responses. Please feel free to provide any comments to me via e-mail within 2 days with any changes.

1. How would you describe your target market for both your physical location and online website?
  
2. What marketing strategies have you used for both the goods and services you market to your target customers online?
  
3. What strategies do you use to establish and maintain relationships with your target customers in store and online?
  
4. What are your pricing strategies for the online store and the physical store?
  
5. What promotional strategies do you use for marketing to online customers?
  
6. What social media sites do you use to reach your target market?
  
7. What strategies do you use to reach online customers?

8. How do you measure the effectiveness or success of your marketing strategies?
  
9. Please share any additional information pertaining to marketing strategies for your store that were not covered.

## Appendix F: McLean and DeLone Prescreen Checklist

Success Variables	Defined	Characteristics	Me t	No t me t
System Quality	Desirable information system	Attractive visual design System flexibility Response times Ease of placing and tracking order Secure and easy payments		
Information Quality	Desirable system outputs	Accuracy of price and product info Up to date information on website Useful information		
User Satisfaction	Attractiveness of website	Enjoyment Attractive appearance Inspire user control		
Usability	Ease of use website	Easy to navigate Error prevention Speed Consistency		