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Strategies for Small Business Leaders to Enter the Business Process Outsourcing Market

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Walden University

College of Management and Technology

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Edwina Labat

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Walden University
2018

Abstract

Strategies for Small Business Leaders to Enter the

Business Process Outsourcing Market

by

Edwina Labat

MBA, National University, 1980

BS, San Diego State University, 1978

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

October 2018

Abstract

Many small businesses in the United States declare bankruptcy within the first 5 years of starting operations. Small business leaders may avoid bankruptcy if they would take advantage of the financial benefits associated with entering the business process outsourcing (BPO) market as service providers. BPO service providers in the United States have experienced significant revenue increases since entering this growing market. This multicase study was an exploration of the strategies small business leaders use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy in the metropolitan Atlanta, Georgia, area. The multicase population consisted of 4 small business leaders from 3 companies who successfully entered the BPO market as service providers and increased revenue. The conceptual framework for this study was the resource-based view theory. The data collection process included semistructured interviews, interview notes, and company records. Data were compiled and organized, disassembled into fragments, reassembled into sequence of groups, and interpreted for meaning. Methodological triangulation and member checking validated the trustworthiness of those interpretations. Three themes emerged from the data collected: using professional resources and personal skills to enter the BPO market; entering into trade contracts with BPO clients; and establishing and building on relationships with BPO clients. The implications for positive social change include the potential to increase the success rate of small businesses, improve and revitalize the economic and social conditions of the local community by providing jobs.

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Dedication

This doctoral study is dedicated to my family, Edward & Ruby White, Jesse Martin, and Governor & Hortense Blackwell, who laid the foundation for pursuing an advanced education, RIH. My family encouraged and supported me throughout this journey. I hope my experience will build upon this foundation for my children, grandchildren, and future generations. A special dedication to Jeff Jackson, my brother from another mother, RIH.

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Section 1: Foundation of the Study

The dynamic, turbulent, and chaotic global external conditions require small business leaders to identify, design, and adapt business practices to ever-changing conditions that increase revenue and reduce the likelihood of bankruptcy (Rolleri, Nadim, & Lussier, 2016). BPO, the fastest growing segment of the outsourcing market (Barua & Mani, 2014; Lacity & Willcocks, 2017), is the movement of business processes from an organization to external service providers (Willcocks, Lacity, & Sauer, 2017).

Outsourcing has evolved from a tool that business executives used to reduce costs and carry out business processes based on transactions, into an important strategy business executives use to transform businesses, focusing on the main organizational traits (Barua & Mani, 2014). The growth of the BPO industry shows no sign of slowing down as major corporations and government agencies significantly increased the practice of outsourcing noncore functions (Lacity & Willcocks, 2017). Outsourcing noncore functions provides a new source of opportunity and competitive advantage (CA) for businesses in the global marketplace (Willcocks et al., 2017). The BPO market provides additional opportunities for small businesses to enter the BPO market as service providers (Lacity & Willcocks, 2017). Many small business leaders disregard the potential revenue increase opportunities available as service providers in the expanding BPO industry to increase revenue and reduce the likelihood of bankruptcy (Lacity & Willcocks, 2017). Most small business leaders lack strategies to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy (Elkholy & ElShewy, 2016).

Background of the Problem

Small business leaders must identify and overcome internal and external obstacles that make success difficult (Rolleri et al., 2016). The failure of small businesses depends in part on the context of a larger system and environment in which they operate (Rolleri et al., 2016). From 1990 to 2010, the change in the industrial landscape of global business from natural resource companies and manufacturing firms to capital and human resource intensive industries paved the way for the emergence of BPO (Patil & Wongsurawat, 2015). Developments such as globalization, corporate restructuring, more demanding customers, and advances in technology provided important drivers in the BPO market (Gerbl, McIvor, Loane, & Humphreys, 2015). Advancements in technology allowed companies to outsource noncore activities to specialized service providers and focus on improved quality of core competencies of the company to gain CA (Elkholy & ElShewy, 2016; Nyameboame & Haddud, 2017).

Initially, the main motivation in BPO strategies involved transactional cost savings. However, as BPO practices became more complex, clients placed less emphasis on transaction costs and more emphasis on quality, innovation, and relationships (Chou, Techatassanasoontom, & Hung, 2015). Quality and innovation helped clients select providers that offer a combination of quality, innovation, cost savings, and long-term relationships (Elkholy & ElShewy, 2016). Many small business leaders lack strategies to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy (Elkholy & ElShewy, 2016).

Problem Statement

Many small business leaders declare bankruptcy within the first 5 years of starting operations (U.S. Small Business Administration [SBA], 2014). Small business leaders may avoid bankruptcy if they would take advantage of the financial benefits associated with entering the BPO market as service providers, as BPO revenue for service providers grew from \$304 billion in 2014 (Willcocks et al., 2017) to more than \$1 trillion in 2016 (Lacity & Willcocks, 2017). The general business problem was that some small business leaders are not aware of potential revenue increases when entering the growing BPO market as service providers. The specific business problem was that some small business leaders lack strategies to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy.

Purpose Statement

The purpose of this qualitative multicase study was to explore strategies small business leaders use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. The target population for this study consisted of four small business leaders from three organizations located in metropolitan Atlanta possessing successful experience in entering the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. The implications for social change included the positive effect successful small business leaders have on the social and economic conditions in the surrounding community by creating jobs, developing community programs, and implementing neighborhood programs.

Nature of the Study

Qualitative, quantitative, and mixed-methods research methodologies are the three paradigms available to researchers (Saunders, Lewis, & Thornhill, 2016). The qualitative research method allows for the exploration of an existing phenomenon through various data sources that emphasize depth of understanding rather than generalizability (Bhati, Hoyt, & Huffman, 2014). The qualitative research methodology was the most suitable research methodology for this study because I explored an existing phenomenon using various data sources to emphasize depth of understanding of the phenomenon.

Researchers use the quantitative method to examine relationships among variables using statistical analyses and to test hypotheses (Bhati et al., 2014). I did not select the quantitative research methodology for this study because I did not test hypotheses or examine relationships among variables using statistical analyses. Furthermore, researchers use the mixed-methods research methodology to combine qualitative and quantitative research methods to address both exploratory (qualitative) and confirmatory (quantitative) research questions (Creswell & Creswell, 2017). The mixed-methods research methodology has challenges for novice researchers because of the high level of complexity in its design, integration, and rigor (Merriam & Tisdell, 2016; Schoonenboom, 2018). I did not select the mixed-methods research methodology for this study because I am a novice researcher and the mixed-methods research methodology requires a high level of sophistication in the design, integration, and rigor associated with the use of both quantitative and qualitative research methods in a single study.

Researchers use the case study design to obtain valid, high-quality data explaining the *what*, *why*, or *how* of a phenomenon (Yin, 2018). In addition, the case study design allows researchers to ask open-ended, semistructured interview questions that might lead to additional information beyond the original preconceived scope of a study (Ridder, Hoon, & McCandless Baluch, 2014; Yin, 2018). I selected the case study design because I asked participants open-ended, semistructured interview questions that helped me answer the overarching research question for this study.

I also considered other research designs, including ethnographic and phenomenological. In an ethnographic research design, culture is the central concept to study actions and interactions of individuals within a group, as researchers immerse themselves in the culture to study it (Marshall & Rossman, 2016). I did not choose an ethnographic design because the focus of my study was not actions and interactions of individuals within a cultural group. Merriam and Tisdell (2016) claimed that the focus of phenomenology is on participants' description of their lived experiences and social actions based on a phenomenon. A phenomenological research design was not appropriate for this study because I did not focus on lived experiences and social actions based on a phenomenon. I selected the qualitative research methodology because the purpose of this study was to explore an existing phenomenon using various data sources to emphasize depth of understanding of the phenomenon. The case study research design was suitable for this study because study participants answered open-ended interview questions that allowed me to explore the *what*, *why*, and *how* questions related to a

phenomenon, which focused on strategies small business leaders use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy.

Research Question

The overarching research question for this study was as follows: What strategies do small business leaders use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy?

Interview Questions

1. What strategies have proven successful in entering the BPO market as a service provider to increase revenue in your organization?
2. How do you assess the success of the strategies you have used to enter the BPO market as a service provider in your organization?
3. What strategies were most effective in the successful entry into the BPO market as a service provider to increase revenue in your organization?
4. How does upper management promote policies and values that align with the successful entry into the BPO market as a service provider to increase revenue in your organization?
5. How are strategies related to the successful entry into the BPO market as a service provider to increase revenue effectively communicated throughout your organizational ranks and among stakeholders?
6. What are some examples of strategies you used to successfully enter the BPO market as a service provider to increase revenue in your organization?

7. Which strategies that you used to enter the BPO market as a service provider to increase revenue in your organization were the least effective?
8. What role does leadership play in the successful entry into the BPO market as a service provider to increase revenue in your organization?
9. What are some of the benefits of successful strategies you used to enter the BPO market as a service provider to increase revenue in your organization?
10. What are some of the consequences of not having strategies for the successful entry into the BPO market as a service provider to increase revenue?
11. What do you think is important for you to say that I have not asked you regarding strategies used to successfully enter the BPO market as a service provider to increase revenue in your organization?
12. What role does innovation play in your business strategy?

Conceptual Framework

The conceptual framework for this study was the RBV theory. Wernerfelt (1984) coined the term RBV and argued that the internal strategic resources serve as a basis of CA due to alignment with the firm's strategic intent. Business leaders use the RBV theory to provide a strategic approach to understand which resources strengthen the firm and which have a high priority value (Hafeez & Anderson, 2014). Resources include brand names, proprietary knowledge, technology, skilled personnel, trade contracts, efficient procedures, relationships, and other tangible and intangible assets tied to the firm (Wernerfelt, 1984).

Wernerfelt (1984) claimed that the manager of internal resources, such as trade and BPO market contracts, could influence organizational performance, particularly if the resource is unique. If a competitor can easily replicate a resource, this resource would not represent a tool to gain a CA. Small business leaders' successful management of the internal resources, such as trade and BPO market contracts against the external demands and threats, could lead to organizational sustainability (Marshall, Ambrose, McIvor, & Lamming, 2015). A key element of the RBV strategic process in BPO includes viewing the firm as a group of resources that create a CA (Gorovaia & Windsperger, 2018; Mageto, Prinsloo, & Rose, 2018). In addition, increasing understanding of the competitive environment and identifying qualities and capabilities to improve performance enable small business leaders to formulate strategies to enter the BPO market and compete effectively to satisfy client needs as service providers (Chou et al., 2015; Tebboune & Urquhart, 2016).

Operational Definitions

Backsourcing: Backsourcing is when services previously outsourced to a third party are currently provided in-house (Nagpal, 2015).

Business processes: Business processes are logically related tasks performed to achieve a defined business outcome such as accounting, human resource management, logistics, customer service, and information technology (Paula & Zacarias, 2017).

Business process offshoring: Business process offshoring is the transfer of work completed in the home country to an external organization in a foreign country (Mykhaylenko, Motika, Waehrens, & Slepnirov, 2015).

Business process outsourcing: Business process outsourcing is a contractual delegation of an activity normally performed in-house to an external supplier based in the same country (Gerbl et al., 2015).

Business process outsourcing service provider: Business process outsourcing service provider is an external company providing outsourced services to clients (Gerbl et al., 2015).

Key competency: Key competency is a main quality or focus of an individual or company, which is sometimes referred to as core function (Festel, DeNardo, & Simmen, 2014).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are facts assumed to be true by the researcher but prove difficult to verify (Corbin & Strauss, 2015). These included (a) each participant would respond openly and honestly in the multicase study, (b) the small business leaders who participated in the study would identify and expound on the various strategies they thought contributed to the growth and success of their companies, and (c) the information presented in this study added to the body of knowledge about successful strategies small business leaders use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. Moreover, additional assumptions included (a) the concept of BPO was universal across industries, cultures, and organizations; (b) the data collected from participants assisted with answering the overarching research question;

and (c) that small business leaders would participate in the study and that documents for review were accessible.

Limitations

Limitations indicate potential weaknesses in the study (Corbin & Strauss, 2015). A limitation, or potential weakness of this study, was that only a few small business leaders would participate in this study (Marshall & Rossman, 2016). Conducting a study at a few organizations prevented the application of findings across the BPO industry. In addition, some small business leaders could choose not to participate in the study. Furthermore, the time limit for interviews was another limitation of the study.

Delimitations

Delimitations define the boundaries of the study (Corbin & Strauss, 2015). The delimitations or boundaries for this study involved conducting in-depth, face-to-face, semistructured interviews with only a few small business leaders in metropolitan Atlanta. Furthermore, only selected participants meeting the eligibility criteria participated in this study. The criteria were that small business leaders must have successful experience in entering the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy.

Significance of the Study

Contribution to Business Practice

The study findings may be of value to businesses because small businesses in the United States account for (a) 99.7% employer firms, (b) 63% new net private-sector jobs, (c) 48.5% private-sector employment, (d) 37% high-tech employment, and (e) 98% of

firms exporting goods (SBA, 2014). As large corporations and government agencies in the United States downsize, small businesses' contributions become increasingly important to business practice (Krstic & Kahrovic, 2015). This study may contribute to the effective practice of business because the results served as a resource to increase some small business leaders' knowledge and understanding of various BPO strategies that could increase revenue and reduce the likelihood of bankruptcy.

Implications for Social Change

The immediate environment, sustainable behavior, and neighborhoods in which small businesses operate strengthen the ties with communities and increase the probabilities of success (Rolleri et al., 2016). Small businesses are an essential part of the economy by providing local employment, improving employee performance, and increasing employee spending (Esmaeilpour & Barjoei, 2016). The results of this qualitative multicase study may positively affect social change by increasing the success rate of small businesses. Successful small business leaders invest in improving and revitalizing the social and economic conditions of communities by providing jobs, sponsorships, donations to schools, shelters, food banks, scholarship funds, sports, and cultural arts programs (Mikolajek-Gocejna, 2016).

A Review of the Professional and Academic Literature

The review of the literature includes an introduction; the strategy for searching the literature; the number of references used; and the frequencies and percentages of peer-reviewed articles, government websites, and publication dates within the 2014-2018 period. In addition, this section includes the application of the literature to the conceptual

framework and a brief description of the purpose of the study. Throughout the literature review, I present a synthesis of different points of view and relationships between previous research and findings with this study. Finally, the literature review includes subsections of relevant theories and themes identified in the literature.

The review of the literature includes information related to the conceptual framework and foundation about strategies small business leaders use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. The literature review contains the conceptual framework with emphasis on decision making, ways to capitalize on BPO, and the long-term value of BPO. The main component of the literature review involves a discussion about the way other researchers used the RBV in their studies. This section includes a critical analysis and synthesis of the framework for RBV using supporting theories from literature relevant to the topic of BPO. The relevant theories include (a) transaction cost economics (TCE), (b) relational view theory (RVT), (c) core competency theory (CCT), and (d) agency theory (AT).

The review includes literature on RBV and BPO published in various academic journals and seminal scholarly books. Google Scholar, linked to the Walden University Library's website, served as the primary source for accessing journal articles. Walden University's Library allows students access to various databases. The databases accessed to obtain literature for this study include Business Source Complete, ABI/INFORM Complete, Emerald Management, Sage Premier, Academic Search Complete, and ProQuest Central. In addition, I used various open journals to obtain literature related to RBV, specifically in the BPO context. I used AOSIS Open Journals to obtain open-access

to peer-reviewed scholarly journals from various academic disciplines. Similarly, Science Direct provided access to a full-text scientific database containing journal articles and book chapters.

My strategy for searching through existing literature entailed using keywords and phrases in the various databases listed previously. The application of filters to database searches narrowed down the search results. These filters included specific keywords, a specified date range, and specific databases. Preference to articles published in or after 2014 and available in the Walden University Library ensured topical and relevant literature. The keywords and phrases used in the search included *resource-based view*, *resource-based theory*, *strategies*, *strategic relationships*, *business process outsourcing*, *outsourcing relationships and governance*, *innovation*, *transaction cost economics*, *relational view theory*, *core competency theory*, *agency theory* and other combinations of these terms. Ulrich's Periodicals Directory served as a tool to help verify peer-reviewed literature. The 161 references that comprise this study include 158 scholarly peer-reviewed articles, representing 98% of the total; three government websites, representing 2% of the total; and excludes non-scholarly articles. The total number of references published within the 2014-2018 period is 137, which is 85% of the total number of references. The literature review includes 65 references that consist of 62 (95%) peer-reviewed articles and three government websites (5%).

I identified several themes in the literature, which included relationships and governance, strategies, and innovation. The first theme, relationships and governance, includes the importance of relationships and governance in BPO partnerships and

integration of processes. Strategies, the second theme, includes a discussion about the various objectives used to develop BPO strategies. The final theme, innovation, outlines the effect of innovation on vendor selection, capabilities, sustainability of BPO contracts, increase in revenue, and CA.

Application to Applied Business Problem

The purpose of the qualitative, multicase study was to explore strategies small business leaders use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. The findings from this study may provide insight into BPO strategies from a group of small business leaders' perspectives. These findings may assist small business leaders develop industry appropriate strategies to enter the BPO market as service providers and reduce the likelihood of bankruptcy. Once an understanding of the underlying meaning emerges, industry-appropriate strategies could equip small business leaders and other leaders with the qualities to improve BPO strategies to increase revenue and reduce the likelihood of bankruptcy. Furthermore, the results of the study might improve business practice by identifying industry appropriate strategies, which lead to increased revenue and reduced likelihood of small business bankruptcy. The potential for social change rests in the development of strategies that improve the personal well-being of small business leaders that they may positively improve the social conditions of the community by developing and implementing neighborhood programs.

The literature review contains the RBV conceptual framework with emphasis on strategy, decision making, ways to capitalize on BPO, and the long-term value of BPO.

The main component of the literature review involves a discussion about the way other researchers used the RBV in their studies. This section includes a critical analysis and synthesis of the framework for RBV using supporting theories from literature relevant to the topic of BPO. The relevant theories include (a) transaction cost economics (TCE), (b) relational view theory (RVT), (c) core competency theory (CCT), and (d) agency theory (AT). Identification of themes in the literature includes relationships and governance, strategies, and innovation. The first theme, relationships and governance, includes the importance of relationships and governance in BPO partnerships and integration of processes. Strategies, the second theme, includes a discussion about the various objectives used to develop BPO strategies for small business leaders use to enter the BPO market as service providers. The final theme, innovation, outlines the effect of innovation on vendor selection, capabilities, sustainability of BPO contracts, increase in revenue, and CA.

Resource-Based View Theory

The original research context in the development of RBV involved the intent to answer the question, *what is an organization* (Astley & Van de Ven, 1983). In response to that question, Penrose (1959) made substantial contributions by viewing firms as broader sets of resources. Without specifically using the term RBV, Penrose concluded that combinations of resources led to incomparable opportunities that resulted in growth and consequent financial outcomes. However, in 1984, Wernerfelt (1984) named the theory RBV. Since 1959, a variety of disciplines contributed to evolution of this theory (Swanson & Droege, 2016) but the principal development of RBV occurred between

1984 and 1995 (Almarri & Gardiner, 2014). Some confusion still exists as to whether the term resource-based theory or resource-based view seems more appropriate (Kozlenkova, Samaha, & Palmatier, 2014).

Wernerfelt (1984) purported new strategic options to improve firm performance, increase profitability, and gain CA. Silva, Gomes, Lages, and Pereira (2014) viewed the traditional concept of strategy as the strengths and weaknesses of a firm's resources used to create products. However, Wernerfelt regarded new strategic options from a RBV perspective rather than a product perspective. RBV serves as a framework for the basis to relate the characteristics of a firm to the benefits derived from the firm (Lazzari, Sarate, Goncalves, & Vieira, 2014) as well as how firm assets create sustainable CA (Gillis, Combs, & Ketchen, 2014; Swanson & Droege, 2016). Wiengarten, Humphreys, Cao, and McHugh (2013) purported that the RBV framework contributed value to researchers' and practitioners' understanding of the complexity of business processes and achieving CA. Resources used to gain and sustain CA include brand names, proprietary knowledge, technology, skilled personnel, trade contracts, efficient procedures, relationships, and other tangible and intangible assets tied to the firm (El Shafeey & Trott, 2014).

Strategy-driven outsourcing from the RBV entails a firm's resources and capabilities that generate rates of return above normal and enable sustainable CA (Edvardsson & Teitsdottir, 2015). However, Yap, Lim, Jaludin, and Lee (2016) found that outsourcing information and communication technology (ICT) created opportunities for organizations and service providers. Important determinants in ICT outsourcing include asset specificity and uncertainty but business and technical qualities conflict with

RBV in ICT (Yap et al., 2016). Many researchers used RBV for conceptual and empirical studies as a basis for how to achieve organizational performance and competitiveness (Swanson & Droege, 2016).

Sustainable CA occurs only when highlighted by two resource assumptions, *immobility*, and *heterogeneity*, which enable business leaders to delineate sustainable CA (Ritthaisong, Johri, & Speece, 2014; Swanson & Droege, 2016). Resource immobility makes it difficult to transfer combinations from one entity to another (Swanson & Droege, 2016). Resource heterogeneity involves differing resource combinations that make it difficult for others to acquire (Swanson & Droege, 2016). A firm possessing valuable resources that few other firms possess, find too costly, or difficult to imitate generate sustained CA (Akaeze, 2016).

Unique resource combinations such as rare, inimitable, valuable, and nonsubstitutable resources make it difficult for entities to copy or transfer to other entities and contribute to creation and sustainability of CA (Lazzari et al., 2014; Ritthaisong et al., 2014; Swanson & Droege, 2016). A rare resource occurs when only a small number of competing firms controls it (Akaeze, 2016; Kozlenkova et al., 2014). A resource too costly to obtain or develop by competing firms is considered inimitable (Akaeze, 2016; Kozlenkova et al., 2014). A valuable resource enables a firm to produce and implement strategies to reduce the firm's net costs and increase the firm's net revenues (Akaeze, 2016; Kozlenkova et al., 2014). Non-substitutable resources enable a firm to exploit the full competitive benefits and capabilities (Akaeze, 2016; Kozlenkova et al., 2014).

Ritthaisong et al. (2014) explored RBV of resource acceleration in a firm's early stages of operation. The RBV of the firm includes the creation, sources, and maintenance of CA proactively and occurs through acquiring and accumulating strategic resources (El Shafeey & Trott, 2014). The use of RBV in marketing research includes important framework for explaining and predicting performance and CA outcomes (Kozlenkova et al., 2014). A firm achieves CA when the firm generates more economic value than its breakeven market competitor (Kozlenkova et al., 2014). Furthermore, sustained CA occurs when the firm creates more economic value than the industry marginal firm and the inability of other firms to duplicate the strategy benefits (Kozlenkova et al., 2014).

Kozlenkova et al. (2014) analyzed the use of RBV from four perspectives that include application to the marketing domain, market-based resources, marketing exchanges, and related theories. Researchers assessing RBV across many fields obtain a theoretical account for incorporating diverse resources to detail cooperative results on performance and affiliated alternatives (Kozlenkova et al., 2014). Market-based resources refer to a firm's assets and capabilities such as brand building, relationships, knowledge, and innovation (Kozlenkova et al., 2014). Several researches (Kozlenkova et al., 2014; Park, Lee, Lee, & Koo, 2017) applied RBV to determine the effect of exchange-level resources on firm-to-firm and seller-customer relationships and organizational performance.

Researchers investigated the effect of performance on technology capability and the influence on supply chain management using RBV in Malaysian organizations (Zailani, Shaharudin, Razmi, & Iranmanesh, 2017). Zailani et al. (2017) determined the

importance of firm resources to achieve the highest levels of technology capability.

Drouin and Jugdev (2014) used RBV to help them determine resource superiority in the firm. Reddy and Rao (2014) used the social complexity and causal ambiguity of RBV as tools for examining the competitiveness of the firm. Florea, Cheung, and Herndon (2013) demonstrated the diversity and value of RBV for the analysis of their study. Florea et al. explored the role of values in firm sustainability on human resource practices and explained the promotion of organizational performance. The results of the study revealed inefficiencies in implementation of firm sustainability without employees' values (Florea et al., 2013).

Pulles and Schiele (2013) used RBV as the framework to explore the manner in which regional clusters affect the organizations' increased levels of CA. The researchers combined viewpoints on social capital and cluster embedment to clarify resource allocation (Pulles & Schiele, 2013). The study bridged gaps on the subject of clusters in RBV literature and further contributed to RBV through the examination of preferential resources among firms (Pulles & Schiele, 2013). Welter, Bosse, and Alvarez (2013) used RBV to examine the effect of the interaction between managerial and technological capabilities on organizational performance. Welter et al. proposed that business leaders conceptualize strategic opportunities and define competitors in the industry. Welter et al. concluded that the principal drivers of profitability and strategic advantage are internal resources.

Researchers contended whether they could use the RBV model to satisfy key theoretical system requirements (Garg & De, 2014). The disconnect between practice and

RBV gave rise to the measurement of a firm's performance separate from competitors (Newbert, 2014). Garg and De (2014) challenged the RBV's contribution to theory building on explanatory power and strategic management from a strategic management point of view. Key concepts such as resources, capabilities, competencies, dynamic capabilities, and core competencies lacked specific definitions (Warnier, Weppe, & Lecocq, 2013).

Tangible resources essential to the survival and development of SMEs include the availability of capital, production efficiency, and employee qualifications and ethics (Parnell & Don Lester, 2015). Dejo-Oricain and Aleson (2014) extended the resource categories to include human and technological, foreign shareholders and subsidiaries, and organizational and international experience. In addition, Obeng, Robson, and Haugh (2014) identified intangible resources such as relationships, culture, employee's knowledge, experience, qualities, firm reputation, brand name, trade contacts, and organizational procedures. Intangible resources meet the resource-based criteria of being valuable, rare, and costly to imitate (Obeng et al., 2014). Furthermore, intangible assets, such as intelligence and knowledge, comprise what leaders must acquire and develop as part of their resources to gain a CA (Pop, Stumpel, Bordean, & Borza, 2014). Other significant intangible resources include strength of brand and product quality (Parnell & Don Lester, 2015). Ownership and application of tangible and intangible resources increased performance and sustained a CA (Eldrede & Dean, 2014).

Researchers Kazlauskaite, Autio, Gelbuda, and Sarapovas (2015) viewed size as an important determinant of the magnitude of financial and management resources to

assess SME strength. Many researchers paired RBV with TCE as the theoretical lenses for research. Yap et al. (2016) used TCE paired with RBV to justify the management of outsourcing information and communication technology (ICT) processes. Yap et al. defined ICT outsourcing as the process of selling assets or contracting out staff or activities to a third party for an agreed period. The assessment of potential drivers for the decision to outsource in contract manufacturing and procurement activities led to a variety of complex and contingent factors (Lacity, Khan, & Yan, 2016a). Etuk, Etuk, and Michael (2014) asserted the advantage of small business' flexibility with SME owners ease of making changes and exploitation of opportunities. Etuk et al. also recognized size as the magnitude of financial and managerial strength. Warnier et al. (2013) categorized resources into three heterogeneous types that include strategic, ordinary, and junk. Mathur, Jugdev, and Fung (2014) researched the impact of RBV on firm performance. Mathur et al. designed a model to identify the resources that contribute to a firm's performance to determine the sources required for CA. The relationships between SME leader strategy, resources, and innovation performance of internal resources resulted in a positive effect on SME innovation performance (Laosirihongthong, Prajogo, & Adebajo, 2014).

Pulles and Schiele (2013) used RBV to study how organizational leaders using regional clusters facilitated increased levels of CA in organizations. Pulles and Schiele proposed that a combination of viewpoints on social capital and cluster integration clarified the preferential resource allocation phenomenon. Pulles and Schiele contributed to RBV and bridged gaps in the literature through the examination of preferential

resources among organization clusters. Soo-Young and Whitford (2013) examined the usefulness of RBV when assessing public agencies. Soo-Young and Whitford revealed that resources had both positive and negative effects on the agency and concluded that RBV provided meaningful implications for public agency performance. Soo-Young and Whitford contributed to the RBV literature by ascertaining that when leaders use resources correctly, it leads to improved performance and CA. Furthermore, Soo-Young and Whitford indicated the value and diversity of the RBV framework for research used to understand organizational capabilities and resources to achieve CA.

The performance and survival of a business depend on the way organizational leaders use resources to obtain distinctive capabilities that lead to a CA (Mathur et al., 2014). While internal and external measures of competitiveness include profitability, exports, and market share; quality, cost, delivery, flexibility, and innovation are primary sources to gain a CA for the manufacturing sector (Laosirihongthong et al., 2014). Organizational leaders use agility, defined as the adoption of speed, flexibility, profitability, innovation, and quality as competitive bases through the integration of reconfigurable resources to provide customer-driven products and services in an uncertain market setting (Yusuf et al., 2014).

Although business leaders achieve a CA for their organizations by possessing valuable, unique, and difficult-to-imitate resources and capabilities, CA sustainability depends on the firm's innovative capacities (Hillman & Kaliappen, 2015). Conversely, qualified human resources, the existence of a network, and experience positively affect SME success (Dejo-Oricain & Aleson, 2014).

CA is how a business leader creates and maintains competitiveness in a dynamic and complex environment (Camison, Fores, & Puig-Denia, 2016). Using either framework alone makes it difficult for a firm to create a CA (Camison et al., 2016). Firm capabilities proved more important than tangible resources and environmental effects (Camison et al., 2016).

Campbell and Park (2017) combined RBV with instrumental stakeholder approach, which includes resources such as social capital, entrepreneurial orientation, intellectual capital, and strategic management of community as a stakeholder to measure their contribution to small business performance. Campbell and Park supported the combination of RBV and the instrumental stakeholder approach to overall performance. Researchers (Wantao, Chavez, & Mengying, 2017) used the RBV perspective to link green supply management and performance. Wantao et al. (2017) found that collaboration between green purchasing agents and suppliers has a significant positive effect on environmental and operational performance.

Larty, Jack, and Lockett (2017) used RBV of a policy-led knowledge exchange network to understand the importance of an intermediary in supporting policy makers in regional development activities. Larty et al. provided new insights into resource combinations that resulted in the successful creation and expansion of a regional knowledge exchange network. Furthermore, Popli, Ladkani, and Gaur (2017) proposed, from an RBV perspective, that associated companies, as opposed to individual companies, leverage their competencies to achieve excellent long-term acquisition performance. Popli et al. found that group diversity showed the experience and variation

of the group through the boards of directors, which impacted long-term, post-acquisition performance of the associated companies (Popli et al., 2017).

Other Relevant Theories

This section includes a critical analysis and synthesis of literature related to BPO, which is the topic selected for this study. In addition, this section includes a critical analysis of supporting and contrasting theories in relation to RBV along with a discussion of TCE, RVT, CCT, and AT provide a lens for how RBV relates to BPO. Lastly, this section ends with a discussion of themes identified in the literature.

Transaction costs economics. Duan, Grover, Roberts, and Balakrishnan (2014) described two theoretical perspectives, economic and strategic, frequently applied to the study of BPO. An economic perspective, known as TCE, refers to firms that adopted governance structures which minimized transaction costs. However, TCE dealt with direct costs of managing relationships and opportunity costs of making inferior governance decisions, which led to less satisfactory results as the context became more difficult to manage (Duan et al., 2014). Chakravarty, Grewal, Sarker, and Samnamurthy (2014) applied TCE to suggest that firms might benefit by outsourcing certain tasks to specific geographic locations.

Relational view theory. Duan et al. (2014) identified a strategic perspective used in BPO research, known as the RVT, which refers to a network of firms that develop interfirm relationships which resulted in profits jointly generated that each firm could not attain alone. Furthermore, business leaders using the transformed method of conducting business achieved rapid levels of value chain improvement and sustainability in

competitive performance (Duan et al., 2014). Duan et al. suggested that formal contracts used in BPO arrangements contained two limitations (a) incomplete coverage of all issues, and (b) economic transactions embedded in social contexts. Furthermore, Duan et al. found that TCE in BPO arrangements includes intertwined governance structures between polar modes of the market and insufficient transaction costs to justify vertical integration. Marshall et al. (2015) explored constructs from TCE, RVT, and RBV that revealed political and rational effects on the BPO process and outcomes. Moreover, Duan et al. concluded that strategic relational governance mechanisms proved superior to TCE because of cooperative relationships driven by strategic and social resource opportunities that led to profits generated through relational advantage. However, Marshall et al. (2015) explained how TCE gives rise to opportunism between firms in the outsourcing process without regard for influence of individual interest.

Hansen and Rasmussen (2013) indicated the importance of correctly reflecting the power and interdependency in BPO strategies to create an appropriately aligned BPO relationship. However, power and dependency changed over time and required changes in the strategy for the relationship to remain aligned and appropriate (Gercek, Saleem, & Steel, 2016; Hansen & Rasmussen, 2013). Maciejczyk (2016) suggested that BPO relationships require mechanisms of control. Organizational structure functions as a control mechanism because of the impact on planning, operations, measurement, feedback, evaluation, and reward (Maciejczyk, 2016). The results of the study conducted by Hansen and Rasmussen (2013) suggested that, from a TCE perspective, the most powerful partner dominated and caused an asymmetric relationship. Conversely, the RVT

perspective indicated that embedded knowledge in organizational practices and relationships encouraged trust and interaction, which resulted in a mutually beneficial strategic partnership (Hansen & Rasmussen, 2013). Finally, Hansen and Rasmussen concluded that a mobility BPO relationship strategy includes a detailed projection of how and under which conditions the relationship might change; and that the strategy needed to maintain alignment and appropriateness in the relationship.

Sonfield (2014) analyzed emergent BPO strategic trends of small businesses (SB) and investigated how family-owned and non-family owned SB differed in BPO strategies. In addition, Sonfield suggested that TCE helped explain managerial decisions and strategies with asset specificity, opportunism, and risk aversion as the primary factors used to minimize costs. Furthermore, the availability of family-controlled suppliers, economic goals, and lower control concentration positively impacted the BPO strategies of family owned SB (Sonfield, 2014). The results of Sonfield's study indicated that owners of SB, regardless of family ownership, must understand the potential viability, value, guidelines, positive, and negative factors of BPO strategic decisions.

Lacity and Willcocks (2017) identified relevant lessons for Western based clients (WBC) who sought services from South Africa's BPO service providers. Lacity, Solomon, Yan, and Willcocks (2016b) indicated that BPO decisions emerged from mainly TCE, an effort to minimize total costs and to mitigate opportunistic behavior of the provider, which failed to adopt sound governance policies. In addition, Lacity et al. indicated that established practices of WBCs lacked policies in terms of treating providers as partners, resolving issues collaboratively, and protecting providers'

commercial interests. Finally, Lacity et al. concluded that the RVT perspective provided justification for WBCs to design effective governance structures and invest enough resources that balanced home office needs with that of the South African service providers.

Core competency and agency theories. Hansen and Rasmussen (2013) applied the CCT to identify several areas to consider in a vendor selection strategy. These include vendor expectations and potential; long-term relationship goals; increased qualities and knowledge; market and network access; ability to learn, grow, and adapt; and credibility (Hansen & Rasmussen, 2013). Furthermore, application of the CCT revealed other considerations that involve maintaining employee morale, company defenses, and CA (Sonfield, 2014).

Liu, Huo, Liu, and Zhao (2015) applied RBT to test how integration of information sharing and process coordination resources influence outsourcing users' performance, CA, and value creation. Integration of processes reveals gaps in resources and capabilities; enables controls between companies; and allows leverage of resources to create capabilities across boundaries (Liu et al., 2015; Patil & Wongsurawat, 2015). Liu et al. applied the RBT to introduce a new outsourcing practice, online microsourcing, to the current BPO market. Online microsourcing refers to small outsourcing deals with small businesses as the client (Liu et al., 2015). The study conducted by Liu et al. suggested that management made outsourcing decisions more for strategic and convenience reasons than for cost reduction.

Sonfield (2014) identified AT as one of the most relevant theories for small business leaders because issues of common interests versus self-interests and conflicting objectives significantly impact the organization and its performance. Bhattacharya, Singh, and Bhakoo (2013) used the AT to explain how two different entities, in a BPO relationship, perceived outsourcing from different perspectives yet shared commonalities about certain characteristics. Some of the common opinions included environmental uncertainty, conflict, information asymmetry, and duration of contract (Bhattacharya et al., 2013).

Relevant Themes Identified in the Literature

In this section, I describe relevant topics found in the literature. The themes include relationships and governance; innovation and capabilities; and strategies. I discuss the impact of each theme to BPO service providers and clients.

Relationships and governance of business process outsourcing. Governance of outsourcing, defined as an active process to define, adopt, and manage the active roles and responsibilities of the client and service provider in the outsourcing process relationship, allow business owners to outsource services in a systematic manner (Gercek et al., 2016). Barua and Mani (2014) developed a holistic model of BPO governance that addresses relational uncertainty, opportunism, and coordination between partners. In addition, Barua and Mani emphasized that efficient governance structures in BPO relationships serve as more than a contractual mechanism that formalized the relationship. Moreover, Chakravarty et al. (2014) expressed the prevalence of managerial concerns about controlling and coordinating suppliers' activities in outsourcing

relationships, despite the dramatic growth of the market. The appropriate governance structure allows participating companies to define and manage responsibilities and tasks that achieve the objectives of outsourcing and create strategic value (Barua & Mani, 2014). Chakravarty et al. proposed that geographic location of the outsourced supplier, whether domestic or offshore, influences the degree of relational governance for the outsourced task.

Furthermore, relational uncertainty, a key construct in TCE, indirectly impact cooperation and coordination in BPO relationships (Barua & Mani, 2014; Yap et al., 2016). Moreover, as technology advances and renders business capabilities portable, outsourcing strategic processes such as research and development, marketing, and financial planning require complex choices in governing BPO relationships that prevent opportunism (Barua & Mani, 2014). In a different study, Mani and Barua (2015) analyzed the execution and management of relational learning in the context of an ongoing BPO relationship. In relational learning, leaders make investments in communication and collaboration to set common ground, share understanding of the outsourced task, and understand processes, technologies, and structures (Mani & Barua, 2015; Yap et al., 2016). In addition, Mani and Barua indicated that partnership quality determines the level of transfer of tacit knowledge between the firms based on the extent of shared vision, goals, and the mutual belief of no opportunistic activity. Mani and Barua also noted that alignment of heterogeneity performance to incentives and actions generates cooperative behavior in an ongoing outsourcing relationship.

The increased diversity of outsourcing objectives increases the need for partner coordination in the areas of information sharing, alignment of partner interests, and task requirements (Barua & Mani, 2014). In addition, Barua and Mani (2014) argued that a holistic and efficient governance structure responds to the impact of uncertainty in the task environment, coordination requirements, and cooperation of exchange hazards and incentives which shaped the competitive position of the BPO relationship. Finally, Mani and Barua concluded that the process of learning within BPO relationships emerges as an essential element to gain CA.

Lyons and Brennan (2014) identified five frameworks for researchers and practitioners that address BPO relationship to consider. The frameworks include scope, governance, climate, tactics, and evolution (Lyons & Brennan, 2014). The scope of the inter-organizational relationship, determined by the significance and scale of the outsourcing activities occurring, establishes the foundation for the subsequent areas of consideration (Lyons & Brennan, 2014). In addition, some features of the relationship governance include duration, levels of cooperation, investments, risks, and benefits (Lyons & Brennan, 2014). Furthermore, the scope and governance established during contractual negotiations significantly influence the climate of the relationship (Lyons & Brennan, 2014).

Lyons and Brennan (2014) indicated that the appropriate tactics used in the active management of the BPO relationship improve effectiveness and result in a win-win situation. Moreover, Lyons and Brennan found that the life cycle of the BPO relationship evolves through a set of steps. Finally, awareness, exploration, expansion, and

commitment cause dependence of the relationship to deepen as shared values, governance structures, joint investments, and value co-creation evolve over time Krstic and Kahrovic (2015) indicated that unlike in traditional buyer-supplier relationships, challenges exist with client and service provider BPO relationship management. The strategic intent of crucial characteristics in a BPO relationship require depth and scope of relationship; choice of assets to use; and adopted business culture (Krstic & Kahrovic, 2015). Supplier, extended supplier, partner, and strategic partner relationships determined the four levels of BPO relationship maturity (Krstic & Kahrovic, 2015; Lyons & Brennan, 2014). The least mature level existed in a cost-plus supplier relationship strategy followed by the extended supplier relationship which provided services delivered in full, on time and to specifications (Krstic & Kahrovic, 2015). The next maturity level existed in the partner relationship which exhibited a client's high dependence on the dependability, consistency, quality, and reliability of external qualities and services that met the client's firm requirements (Krstic & Kahrovic, 2015; Lyons & Brennan, 2014). Finally, the highest level of relationship maturity existed when shared visions, strategies, and information resulted in a win-win relationship based on collaboration, also known as a strategic partner relationship (Krstic & Kahrovic, 2015).

Innovation and capabilities. Sriboonlue, Ussahawanitchakit, and Raksong (2016) investigated the relationship among strategic innovation capability's dimensions, antecedents, and consequences. Sriboonlue et al. identified innovation capability as one of the key capabilities that influence organizational success and survival. Innovative capability represents the ability to create, reconfigure, and integrate firm resources to

generate new value for the firm (Abebe & Angriawan, 2014; Sriboonlue et al., 2016).

Constraints, resulting from lack of resources, forced leaders to innovate effectively with a combination of resources on hand and market opportunities to maximize profits (Senyard, Baker, Steffens, & Davidson, 2014). Furthermore, new competitors, new emerging technology, and the variety and wariness in customer preferences and demands required firms to develop and improve innovative capability (Sriboonlue et al., 2016).

Strategies. As the use of technology expanded for critical business processes, companies increased the use of BPO services in business operations (Lacity et al., 2016b). BPO became a widely used practice for major corporations and government agencies (Lacity et al., 2016b). Outsourcing back-office functions, such as payroll, benefits administration, customer service, call centers, and technical support enabled companies to reduce payroll and overhead costs and to focus on the core competencies of the organization (Willcocks et al., 2017). Business leaders expanded the scope of BPO implementation throughout their organizations to obtain expert qualities, increase process effectiveness, improve operational efficiency, and enhance strategic performance (Agburu, Anza, & Iyortsuun, 2017). Furthermore, BPO functioned as an important strategic tool to increase CA by controlling overhead costs and accessing new intellectual, technological, and material resources (Krstic & Kahrovic, 2015).

As major corporations and government agencies significantly increased the practice of outsourcing non-core functions, the BPO market growth showed no sign of slowing down (Lacity et al., 2016b). In 2014, the global BPO market exceeded \$304 billion in revenue (Lacity & Willcocks, 2017). In addition, the BPO market had an

estimated worth of \$322 billion with an annual growth rate of 4% worldwide in 2016 (Lacity & Willcocks, 2017). The strong appetite for contracting with domestic, offshore, and global BPO service providers suggests continued growth of the industry market (Lacity & Willcocks, 2017).

Krstic and Kahrovic (2015) designed a conceptual model for BPO as a strategic option for the realization of competitive capabilities and minimization of risks. The model integrated and aligned the decision-making process with long-term, organizational, and strategic objectives and near-term organizational needs (Krstic & Kahrovic, 2015). The model consists of four generic steps to effectively realize a BPO initiative that include (a) establish a BPO team, (b) conduct a BPO analysis, (c) determine BPO possibilities, and (d) develop and present the BPO business plan (Krstic & Kahrovic, 2015). McIvor (2016) identified performance improvement as a key objective in BPO arrangements. The motivation for BPO evolved from a primary focus on cost reduction to emphasis on increasing performance, quality, functionality, and service (McIvor, 2016).

Krstic and Kahrovic (2015) suggested that top management supervise the BPO team by executing the BPO strategy across organizational boundaries to increase performance and ensure value creation. In addition, Krstic and Kahrovic identified BPO analysis as a crucial component of any BPO initiative by examining, mapping, and categorizing internal business processes. Furthermore, the determination of BPO opportunities required consideration of multiple factors such as expectation, risk, and environment in the areas of cost savings, focus on core competencies, and adaptability in management (Krstic & Kahrovic, 2015). Moreover, the model required the team to

develop and present a BPO plan to decision makers with direct recommendations on the suitability of specific BPO opportunities (Krstic & Kahrovic, 2015).

Lacity et al. (2016b) examined the connection between BPO strategic goals and measures of BPO performance in the areas of growth, costs, differentiation, and core competence in large firms. Lacity et al. suggested that activities considered for outsourcing required a low asset specificity and weak resource position to yield costs, core competence, or growth benefits. In addition, Lacity et al. found that setting a greater number of challenging goals, with a higher level of intensity in the pursuit of the goals, resulted in the desired success. Furthermore, the focus on cost reduction or growth resulted in cost reduction goals even though growth cost more in the short term (Lacity et al., 2016b). Finally, Lacity et al. concluded that strategic noncore BPO generated additional benefits in company growth through freed capital and resources to pursue market share and revenue growth.

Conversely, Isaksson and Lantz (2015) explored how outsourcing strategies among small manufacturing firms affected financial performance. Previous research in the field in this area identified a domination of studies of large firms with a United States context and very few studies about small firms nationally or abroad (Isaksson & Lantz, 2015; Sonfield, 2014). In addition, Isaksson and Lantz found that in four outsourcing activity strategies, which included back office, primary, accounting, and support activities, no significant relationship existed between strategies and financial performance.

In summary, this literature review subsection contains a critical analysis and synthesis of literature related to the RBV theory, including a critical analysis with supporting and contrasting theories. Business leaders use the RBV theory to give a strategic approach to allow individuals to understand which resources strengthen the firm and which have a high priority value (Hafeez & Anderson, 2014). Wernerfelt (1984) claimed that the manager of internal resources, such as trade and BPO market contracts, could influence organizational performance, particularly if the resource is unique. If a competitor can easily replicate a resource, this resource would not represent a tool to gain a CA. Small business leaders' successful management of the internal resources, such as trade and BPO market contracts against the external demands and threats, could lead to organizational sustainability (Marshall et al., 2015). Among the contrasting theories, I discussed TCE, RVT, CC, and AT theories as they relate to the BPO market. In addition, I presented a critical analysis and synthesis of literature regarding the literature review themes and the phenomenon under investigation.

Transition

Section 1 included an introduction to BPO, the background of the study, problem statement, purpose statement, and nature of the study. Section 1 also included the overarching research question, interview questions, conceptual framework, operational definitions, and literature review. The review of the literature included information related to the conceptual framework and foundation about strategies small business leaders use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. The literature review contained the conceptual framework

with emphasis on decision making, ways to capitalize on BPO, and the long-term value of BPO. The main component of the literature review involved a discussion about the way other researchers used the RBV in their studies.

The literature review also included a critical analysis and synthesis of the framework for RBV using supporting theories from literature relevant to the topic of BPO. The relevant theories included TCE, RVT, CCT, and AT theories. I identified several themes in the literature, which included relationships and governance, strategies, and innovation. The first theme, relationships and governance, included a discussion of the importance of relationships and governance in BPO partnerships and integration of processes. Strategies, the second theme, included a discussion about the various objectives used to develop BPO strategies. The final theme, innovation, outlined the effect of innovation on vendor selection, capabilities, sustainability of BPO contracts, increase in revenue, and CA.

Section 2 of this study begins with a description of the purpose of the study, role of the researcher, participants, research method and design, population and sampling, and ethical research guidelines. Furthermore, Section 2 includes the following subsections: data collection instruments, data collection techniques, data organization techniques, data analysis, and reliability and validity. The concluding part of Section 2 contains the summary of key points and a transition into Section 3. The information in Section 3 of this study includes an introductory purpose statement and summary of the findings of the study. This section also includes the presentation of findings, application to professional

practice, implications for social change, recommendations for action, recommendations for further research, reflections, and conclusions.

Section 2: The Project

Section 2 includes the restatement of the Purpose Statement, the Role of the Researcher, Participants, Research Method and Design, Population and Sampling, Ethical Research, Data Collection Instruments, and Data Collection Techniques. The information in Section 2 also includes Data Organization Techniques, Data Analysis, and Reliability and Validity of the study. Finally, this section concludes with a summary of key points and a transition into Section 3.

Purpose Statement

The purpose of this qualitative multicase study was to explore strategies small business leaders use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. The target population for this study consisted of four small business leaders from three organizations located in metropolitan Atlanta possessing successful experience in entering the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. The implications for social change included the positive effect successful small business leaders may have on the social and economic conditions in the surrounding communities by creating jobs, developing community programs, and implementing neighborhood programs.

Role of the Researcher

The multicase research design approach requires properly designed field procedures for collecting data from participants in their everyday environment (Corbin & Strauss, 2015; Yin, 2018). Detailed operational procedures enhance the overall quality and efficiency of the data collection process (Yin, 2018). Interviewing people requires

catering to schedules, availability, and flexibility about responses to open-ended questions that might extend beyond the original line of questioning (Denzin & Lincoln, 2018). The researcher serves as the main data collection instrument and creates the research protocol (Corbin & Strauss, 2015). As the main data collection instrument for this study, I set the ground rules and followed the items identified in the protocol for the data collection plan. My plan served as a reminder about the information to collect, provided prompts for questions to ask in the interview, and functioned as a method to stay on track during the data collection process. I (a) gained access to interviewees, (b) established procedures to obtain additional assistance and guidance, (c) set timelines for data collection activities, (d) secured sufficient resources for fieldwork, and (e) prepared provisions for unanticipated events as outlined in the interview protocol (see Appendix A).

Marshall and Rossman (2016) showed the importance of researchers clarifying their research roles, especially in the case where the researcher has a relationship with the research study's main subject matter, an advantage exists, because the researcher already has an understanding of the organizational context. Since 1984, I have owned and operated several small businesses that catered to consumer, corporate, and government markets in the public and private sectors. My exposure to business encompasses the period before the introduction of the Internet and the current business settings, global and social media eras, and global outsourcing environments. I currently own and operate a tax preparation service, insurance agency, business development firm, and real estate investment and management company. I founded a 501(c)3 foundation to assist

underprivileged women start and operate their own businesses. My business experiences have afforded me the opportunities to serve on boards of directors of business, education, and nonprofit organizations at the local, state, and national levels.

The Belmont Report protocol (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979) is a guide for conducting research in an ethical manner. This protocol has ethical principles and guidelines for research involving human subjects. These boundaries between practice, research, and applications include three basic ethical principles that include (a) respect for persons, (b) beneficence, and (c) justice (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979).

Respect for persons refers to treating individuals as autonomous agents and protecting those with diminished autonomy. The rules of beneficence assure no harm to subjects, maximize possible benefits, and minimize possible harm. Finally, justice refers to the fairness of distribution, prevention of denial of entitlement without good cause, and unduly imposition of burden (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979).

Research ethics refers to the standards of the researcher's behavior as it relates to the rights of the participants in the study (Saunders et al., 2016). According to Yin (2018), an effective case study researcher commits to the responsibility to scholarship and maintains a strong professional competence. I accepted responsibility for my work and strived to conduct my study with the highest ethical standards, which included honesty and the avoidance of deception, plagiarism, and falsifying information. Keeping

up with related research, ensuring accuracy, striving for credibility, understanding and divulging the needed qualifiers and limitations help ensure credible and ethical research (Yin, 2018).

Making analytical judgments during the data collection phase helps to identify clues, contradictory and supportive, and additional data to interpret the information in an unbiased manner (Yin, 2018). Researchers use a process called *epoche* to refrain from personal judgment and help mitigate bias (Merriam & Tisdell, 2016). Van Manen (2014) described epoche as bracketing or setting aside personal biases to explore the participant's experience. I used epoche to help mitigate bias, prevent viewing data from a personal lens, and refrain from making personal judgments during the data collection phase. I also stayed on target by understanding the issues and the purpose of the study.

Yin (2018) identified interviews as one of the most important sources of case study evidence. The key to successful interviews involves careful preparation that results in guided fluid conversations versus rigid, structured inquiries (Saunders et al., 2016). Interview protocols outline the rationale and logic for the structure, technique, and approach to analyzing, interpreting, and sharing the results (Denzin & Lincoln, 2018). The interview protocol has procedures and rules regarding interview settings (Yin, 2018). This information supported my rationale for using an interview protocol (see Appendix A) for this study.

Participants

Participants in a research study may include businesses, organizations, or individuals that show how things work in a particular setting, as recommended by several

scholars (Abma & Stake, 2014). Choosing multiple cases for this study enabled the comparison among practices of participants, as well as the interactions within and across entities from an integrated systems perspective, to obtain a more comprehensive understanding of these practices, as recommended by Yin (2018). Learning from best practices identified in business using cases serves as a key purpose for improvement efforts for researchers and practitioners (Turner & Danks, 2014).

Experts suggest that the selection process for participants begins with cases partially identified by three main criteria (Hogevold et al., 2014; Yin, 2018). These criteria include relevance to the topic, diversity across context, and good opportunities to learn about complexity and contexts of the topic (Hogevold et al., 2014; Yin, 2018). For these reasons, the eligibility criteria for this study's participants included that participants must (a) operate a business with less than 100 employees and revenue less than \$10 million in metropolitan Atlanta, (b) possess at least 5 years of successful experience as a service provider in the BPO market, (c) implement strategies that lead to increased revenue, and (d) agree to the study guidelines to participate in open-ended interviews, member checking, and provide information and documentation to reach data saturation.

Yin (2018) denoted that a two-phase approach for screening case study participants to fewer than 12 requires obtaining data from a central source. Screening candidates through query of people and limited documentation about each participant avoids an extensive screening process (Yin, 2018). For these reasons, I contacted small business leaders who were members of the local Chambers of Commerce. I prescreened

members to identify leaders from three small businesses who met the eligibility criteria and showed interest in participating in the study.

Effective research and case study protocol requires an ethical, honest, and objective working relationship with clear communication between the selected participants and the researcher (Yanchar, 2015; Yin, 2018). Working relationships develop in the participants' natural setting (Adebanjo, Teh, & Ahmed, 2018; Cole, 2013) built upon morality, concern, empathy, awareness, and relational community between the researcher and participant (Metz, 2013). For these reasons, I engaged with participants to reveal their expectations of the study. This helped initiate a working relationship. Furthermore, identifying how the study might provide mutually beneficial opportunities enhances the working relationship (Saunders et al., 2016). I encouraged participants to communicate with me as much as possible about this experience to enhance the working relationship.

Researchers recommend that participants selected for a research study align with the overarching research question (Gelling & Engward, 2015) because these participants used successful strategies that address the problem under investigation (Ucbasaran, Shepherd, Lockett, & Lyon, 2013). I selected from a pool of qualified individuals whose knowledge and experience aligned with the overarching research question of this study.

The participants for my study consisted of four small business leaders that met the following criteria: (a) operate a business with fewer than 100 employees and revenue less than \$10 million; (b) possess at least 5 years of successful experience as a service provider in the BPO market; (c) implement strategies that lead to increased revenue; and

(d) agree to the study guidelines to participate in open-ended interviews, member checking, and provide information and documentation to reach data saturation. I identified small business leaders who met the eligibility criteria for this study.

Research Method and Design

The information outlined in the Nature of the Study subsection, found in Section 1, included the qualitative, quantitative, and mixed-methods research methodologies as well as the case study, ethnography, and phenomenology design options available to researchers. This section is an extension of the research methods and design approaches described in the Nature of the Study subsection. I also identified and provided support for my choice of research method and design for this study.

Research Method

Research methodology encompasses the basis for the theoretical and philosophical assumptions for data collection (Saunders et al., 2016). Qualitative research prioritizes the depth and quality of data collected, whereas quantitative research focuses on the number and volume of data collected (Anyan, 2013). The mixed-methods research methodology combines qualitative and quantitative methods (Creswell & Creswell, 2017).

The qualitative method in business research affords a quality of understanding that quantitative measurement alone fails to achieve (Galloway, Kapasi, & Whittam, 2015). Anyan (2013) indicated that researchers use the qualitative research method to gain an in-depth understanding of a phenomenon. Moreover, the qualitative research method allows researchers to obtain a traditional foundation with an interpretive process

to focus on holistic understanding, theory, and concept development (Aguirre & Bolton, 2014). Researchers use qualitative data to provide a deeper understanding of context-specific studies in strategic management and leadership (Bazeley, 2015). For these reasons, I used the qualitative research methodology to gain an in-depth and holistic understanding of the problem I tried to solve in this study.

Researchers choose the quantitative research methodology when testing hypotheses (Maxwell, 2016). According to Anyan (2013), researchers use the quantitative research methodology to test theories in terms of numbers, quantities, amounts, and incidences. The quantitative research methodology allows researchers to identify relationships between variables (Saunders et al., 2016). Because I did not test hypotheses, theories in terms of numbers, or relationships between variables, the quantitative research methodology was inappropriate for this study.

Molina Azorín and Cameron (2015) concluded that many mixed-method studies relied on quantitative data and statistical analyses as the primary part and, the qualitative portion, as preliminary or secondary. Researchers use the mixed-methods research methodology to combine quantitative and qualitative data collection techniques and analytical procedures (Saunders et al., 2016). Yin (2018) suggested that researchers using the mixed-methods research methodology must share the same research question, collect complementary data, and conduct counterpart analysis. The mixed-methods research methodology has challenges for novice researchers because of the high level of complexity in its design, integration, and rigor (Merriam & Tisdell, 2016; Schoonenboom, 2018). I did not select the mixed-methods research methodology for this

study because I am a novice researcher and the mixed-methods research methodology requires a high level of sophistication in the design, integration, and rigor associated with the use of both quantitative and qualitative research methods in a single study.

Research Design

The research design refers to the approach used to implement a plan to explore research questions and draw conclusions from the research study (Leedy & Ormrod, 2013). The framework for the collection and analysis of data provides reasoned justification for selection of data sources, collection methods, and analysis techniques (Saunders et al., 2016). The qualitative research design options include case study, ethnography, phenomenological (Merriam & Tisdell, 2016).

Researchers use the case study design to explore, study, and describe a phenomenon that explains the *what*, *why*, or *how* in the context of an experience (Yin, 2018). In addition, single or multiple cases provide a method for learning from findings in the context of the study (Baškarada, 2014). Furthermore, Thomas, Painbéni, and Barton (2013) used the case study design to explore strategic decisions of leaders to allocate and leverage resources for firm sustainability. Because I explored strategies small business leaders used to successfully enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy, the case study design approach seemed the most suitable for my study.

Ethnography requires researchers to define, locate, and capture their field of exploration (Zilber, 2014). In addition, the ethnographic design entails the study of a group or cultural views through participant observation techniques during an extended

period (Abdulrehman, 2017). Furthermore, researchers live among the group to study the culture of the people (Jerolmack & Khan, 2014). I did not select the ethnographic research design because the focus of my study was not a group or cultural views through participant observation techniques over an extended period.

The phenomenological research design involves the study of a phenomenon from individuals' lived experiences (Berglund, 2015). Tasnim, Yahya, and Zainuddin (2014) used a new trend in phenomenological research, interpretive phenomenological analysis, to examine how individuals make sense of their major life experiences. Although Signori, Flint, and Golicic (2015) used a phenomenology to enable deep interpretations from the perspectives of individuals, this design approach proved unsuitable for my study because I did not focus on the participants' lived experiences and social actions related to the phenomenon under investigation.

Reaching data saturation entails gathering data to the point of replication or redundancy (Marshall, Cardon, Poddar, & Fontenot, 2013; Merriam & Tisdell, 2016). In addition, saturation of data involves reaching the point when further data collection results in repetitive patterns and no new information (Marshall & Rossman, 2016). Fusch and Ness (2015) stated that researchers reach data saturation when researchers do not obtain new data, coding, or themes from additional data collection. I reached data saturation by collecting data from the four participants until no new themes emerged from additional interviews.

Population and Sampling

Researchers use several types of sampling methods, including convenience, snowball, maximum variation, and purposeful (Merriam & Tisdell, 2016). Purposeful sampling in qualitative research helps researchers discover, understand, and gain insight of the problem and research question (Marshall & Rossman, 2016; Merriam & Tisdell, 2016; Robinson, 2014). Researchers use purposeful sampling to (a) narrow down the population based on theoretical concerns, (b) finalize the sample, and (c) understand dimensions of context (Poulis, Poulis, & Plakoyiannaki, 2013). One phase of purposeful sampling entails establishing a selection criterion for participants meeting eligibility standards to address the overarching research question (Marshall & Rossman, 2016; Merriam & Tisdell, 2016; Vine, Clark, Richards, & Weir, 2018). I used purposeful sampling for this study because purposeful sampling allowed me to discover, understand, and gain insight of the problem under investigation. I used purposeful sampling to (a) narrow down the population based on theoretical concerns, (b) finalize the sample, and (c) understand dimensions of context.

Population and sample size in qualitative case study research depend on many complex factors (Marshall & Rossman, 2016). Theoretical and practical considerations influence the size of the sample in an interview case study (Robinson, 2014). Brinkman and Kvale (2015) suggested that theory, type of research, and research question help determine sample size. Sampling decisions and strategies organized into a systematic sampling plan provide a roadmap to follow (Marshall & Rossman, 2016).

Marshall et al. (2013) suggested that most multiple case studies contain two or three cases. Yin (2018) stated that the simplest multicase design consists of two or more cases with literal replication. A sample size of 3 to 16 participants provides scope for developing cross case generalities, prevents the researcher from having more data than needed, and permits defined identity within the sample (Robinson, 2014). Robinson (2014) developed a four-point approach to qualitative sampling that includes (a) define the sample, (b) decide on a sample size, (c) devise a sample strategy, and (d) find the sample source. The research purpose, time, and funding restraints affect sample size (Marshall & Rossman, 2016). Researchers using the qualitative case study design should narrow the scope of the population (Saunders et al., 2016) to decide on a sample size based on conjoint consideration of practical and epistemic concerns (Robinson, 2014). Based on theoretical, practical, time, and funding considerations, I selected four participants for this study from three different business organizations using Robinson's (2014) four-point approach.

Data saturation occurs when the interviewer begins to hear the same information from the participants and obtains no new data (Denzin & Lincoln, 2018; Fusch & Ness, 2015; Marshall & Rossman, 2016). Reaching data saturation entails gathering data to the point of replication or redundancy (Marshall et al., 2013). Data saturation enhances the validity of the study results (Fusch & Ness, 2015). Reaching data saturation entails gathering data to the point of replication or redundancy (Marshall et al., 2013; Merriam & Tisdell, 2016). In addition, saturation of data involves reaching the point when further data collection results in repetitive patterns and no new information (Marshall &

Rossman, 2016). Fusch and Ness (2015) stated that researchers reach data saturation when researchers do not obtain new data, coding, or themes from additional data collection. I reached data saturation by collecting data from the four participants until no new themes emerged from additional interviews.

The participants for my study consisted of four small business leaders meeting the following criteria: (a) operate a business with less than 100 employees and revenue less than \$10 million; (b) possess at least 5 years of successful experience as a service provider in the BPO market; (c) implement strategies that lead to increased revenue; and (d) agree to the study guidelines to participate in open-ended interviews, member checking, and provide information and documentation to reach data saturation. I identified small business leaders meeting the eligibility criteria for this study.

A conducive interview setting enhances the potential to gain access to participants, build trusting relationships with participants, and reduce time expenditures for data collection (Marshall & Rossman, 2016). Conducting semistructured, face-to-face interviews in the participants' everyday environment (Merriam & Tisdell, 2016) requires catering to the participants' schedules and availability (Yin, 2018). Researchers must accommodate the participants' choice of time, dates, and location of interviews (Denzin & Lincoln, 2018; Yin, 2018). I established an appropriate interview setting and gained access to participants by discussing the purpose of the study, interview process, the time commitment, and answering any questions participants had about the study or process. I built relationships with participants during the interview process by asking follow-up probing questions. I reduced time spent with data collection by being prepared for

interviews and efficient while conducting the interviews. I prepared participants for member checking interviews by sending interpreted transcripts to participants in advance for their review. I also requested company documents and records in advance to have information ready for review after member checking interviews.

Ethical Research

The Institutional Review Board (IRB), the U.S. Government, and other institutions have developed necessary policies, codes of ethics, and guidelines for conducting ethical research (Tracy, 2013). However, the researcher's own values and ethics constitute the actual ethical practice and credibility of qualitative research (Merriam & Tisdell, 2016). The informed consent (IC) process entails protecting participants against vulnerability in the interview process and the manner researchers share the results of the interviews (Denzin & Lincoln, 2018). Researchers fully inform participants about the nature, purpose, use of the research findings, and the role of the participant in the study to obtain their voluntary consent (Saunders et al., 2016).

In addition, the IC process includes specific items outlined in the IC form, such as an invitation to participate in the research study with explicit details about the purpose, process, and procedures; potential risks and benefits; voluntary nature of participations and rights to withdraw; confidentiality of records; dissemination of results; statement of consent and contact information (Denzin & Lincoln, 2018); incentives for participation; Walden University's IRB approval number in the final doctoral manuscript; and a statement about safe, 5-year data storage to protect participant confidentiality. I provided each participant with an IC form with specific details about areas outlined in the Walden

DBA rubric and the IRB application and those suggested by Seidman (2013). The IC form included a statement that participants may withdraw from the study at any time without penalty by submitting their request to me in writing via U.S. mail or email, as recommended by several scholars (Yang, 2016). While I did not give any incentives to participants for participating in this study, each participant received a copy of the summary of findings.

Implementation of ethical standards ensures protection of participants (Patton, 2015). I completed training in conducting ethical research and completed the web-based training, titled *Protecting Human Research Participants*, offered by the National Institute of Health Office of Extramural Research. I provided participants verbal assurance of ethical protection and confidentiality of information and results.

I stored data in a secure place and keep it there for a period of 5 years, as required by Walden University's IRB, to protect participant confidentiality. Researchers must destroy data and documents after the 5-year period to prevent access to the information (Marshall & Rossman, 2016). The IRB approval number for this study is 20-20-18-0372240. I stored the data in a secure locked safe and will keep them there for a period of 5 years. After the 5-year period expires, I will shred all documents and destroy all recordings and storage drives used to store data.

The use of coding provides a system for organization, management, confidentiality, and security of information in a research study (Merriam & Tisdell, 2016). The information used in this study did not include the participant's name, company name, or any personal data that could identify them in any reports or results.

Researchers suggest using coding strategies, including open, axial, and selective for the collection and interpretation of data (Zhong & Nieminen, 2015). I kept data confidential by using coding methods. I used coded names for study participants and their affiliated organizations by assigning letters and numbers for identification. In addition, the study did not include any attributes that led to any indirect discovery of study participants or organizations. I assigned each participant a code P1, P2, P3, and P4, and their companies were coded as C1, C2, and C3. I referred to the participants as P1C1, P2C2, P3C2, and P4C3 throughout Section 3.

Data Collection Instruments

In qualitative studies, researchers serve as human instruments in carrying out the data collection process (Yin, 2018). As the primary data collection instrument, the qualitative researcher collects data through participant interviews, and secondary data examination (Leedy & Ormrod, 2013). Secondary data refers to data collected initially for some other purpose and provides a source for further analysis (Saunders et al., 2016). Company documents and records serve as secondary data sources (Fusch & Ness, 2015). Merriam and Tisdell (2016) suggested that the compilation of secondary data sources usually occurs for another purpose. Marshall and Rossman (2016) stated that examination of company documents and records provide background and context that establish a baseline prior to participant interviews. I served as the primary data collection instrument for the study by conducting semistructured interviews with participants and reviewing company records and documents. The secondary sources of information I reviewed included company documents and records such as capability statements, mission

statements, websites, brochures, policies and procedures, employee handbooks, contracts, agreements, and other company documents related to the overarching research question that the business leader considered pertinent to the organizations' BPO strategy.

Furthermore, I analyzed this information for additional knowledge, interpretations, and conclusions until no new information was obtained.

Researchers concluded that interviews serve as the most common format for data collection in qualitative research (Jamshed, 2014). Qualitative research interviews go in depth using the researchers' standards of quality (Marshall & Rossman, 2016). The interview portion of the data collection process must follow the line of inquiry outlined in the case study protocol and serve the needs of the line of inquiry in an unbiased manner (Yin, 2018). Face-to-face semistructured interviews, composed of flexibly worded questions (Merriam & Tisdell, 2016), allow the researcher to ask follow-up probing questions and the participants to elaborate on their answers (Marshall & Rossman, 2016) to gain insight from the participants' perspectives (Denzin & Lincoln, 2018). The interview protocol (see Appendix A) for the study included open-ended, exploratory questions that I asked during the interview. In addition, I asked follow-up probing questions to get as much detail as possible from the participants.

Saunders et al. (2016) suggested the use of an audio recording device and note taking as two advantageous methods to record interview data. The use of a voice-recording device, in addition to note taking, serves as a tool for the researcher to create a database for the case study (Baškarada, 2014). A voice recorder allows the researcher to hear the spoken words during the interview session (Marshall & Rossman, 2016). In

addition, the audio recording helps capture the nature of the questions and the ensuing discussion (Saunders et al., 2016). Note taking during an interview helps maintain concentration, formulate points to summarize, test understanding, and devise follow up probing questions (Galletta, 2013). Furthermore, taking notes also serves as a backup if the audio recorder malfunctions during the interview (Saunders et al., 2016). I used a voice recorder, with the permission of the participant, during the interview and captured the information verbatim and created a database for the case study. In addition, I also took notes to highlight important points, confirm understanding of the participant's response, notate body language, and develop follow-up questions.

Researchers record, transcribe, and interpret recorded interviews for member checking and analysis, using their own words (Saunders et al., 2016). Member checking involves sharing researcher's interpretations of the participants' recorded responses with participants to ensure internal validity (Yin, 2018). Merriam and Tisdell (2016) purported that member checking serves as a quality control mechanism to ensure the accuracy, credibility, reliability, and validity of interviews. Marshall and Rossman (2016) suggested that member checking helps the researcher get reactions, corrections, and in-depth insights from participants. Member checking involves providing participants with interpreted interview data of the participants' recorded responses (Fusch & Ness, 2015), allowing them to verify original statements from the interview (Marshall & Rossman, 2016) and confirm that the interpreted interview data did not change the context of such data (Denzin & Lincoln, 2018). I interpreted participants' interview responses and shared this interpretation with study participants for validation purposes.

Transcription provides a written record of what a participant said in his own words without the researcher's interpretation (Saunders et al., 2016). I personally transcribed the recorded interview data in this study for the purpose of interpreting the semistructured interviews for member checking purposes, as outlined in my interview protocol (see Appendix A). I conducted member checking by interpreting participants' interview responses and sharing this interpretation with study participants for validation purposes.

Data Collection Technique

I conducted semistructured interviews with four participants and reviewed company documents and records, such as capability statements, mission statements, websites, brochures, policies and procedures, employee handbooks, contracts, agreements, and other company documents related to the overarching research question until no new information was obtained. Merriam and Tisdell (2016) identified interviews as the primary data collection strategy in qualitative research. Researchers widely accept the use of interviews as a method for qualitative data collection because interviews enable the researcher to recapture the participants' experiences (Denzin & Lincoln, 2018). The three general categories of interviews conducted by qualitative researchers to collect data consist of structured, unstructured, and semistructured (Marshall & Rossman, 2016). Structured interviews involve the use of questionnaires based on standardized questions (Saunders et al., 2016). Conversely, unstructured interviews allow the interviewee the opportunity to talk freely about a topic in a non-directive way (Saunders et al., 2016). By comparison, semistructured interviews involve the use of themes and

key questions that allow the researcher flexibility to explore the research question and objectives (Saunders et al., 2016).

Adapting research questions, while conducting semistructured interviews, affords researchers more flexibility to ensure the data collection process yields rich and robust data (Marshall & Rossman, 2016). Yin (2018) indicated that questions used in an interview consist of queries that serve as prompts to collect necessary information and help remind the researcher to stay on track, as the researcher proceeds to the data collection. I conducted face-to-face, semistructured interviews with four small business leaders, as outlined in the interview protocol (see Appendix A). In addition, I adapted the questions during the interview to enhance my flexibility to garner rich and robust data about the strategies small business leaders used to enter the BPO market to increase revenue and reduce the likelihood of bankruptcy. Furthermore, I used interview questions to serve as prompts to collect detailed information from participants about their experiences as BPO service providers and stayed on track as the interview proceeded.

Open-ended qualitative interview questions allow participants to describe the phenomenon in their own words (Saunders et al., 2016). In-depth interviews serve as a method to understand the contexts of the individuals' experiences (Denzin & Lincoln, 2018). The use of the overarching research question during in-depth interviews helps guide the direction of the qualitative inquiry (Merriam & Tisdell, 2016), while researchers use supporting questions to promote elaboration about the phenomenon (Saunders et al., 2016). Researchers steer the interview process during semistructured interviews by asking predefined questions and prompting the participant to describe

details about the topic (Saunders et al., 2016). Researchers record and transcribe interviews for analysis (Saunders et al., 2016). I used open-ended qualitative interview questions that allowed participants to elaborate on the strategies they have used to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. Moreover, I used in-depth interviews to gain a better understanding of the contexts of the participants' experiences. In addition, I restated the overarching research question to guide the direction of the interview, this helped me stay on track during the interview. I followed up by asking supporting and probing interview questions to gather rich and descriptive details from participants about strategies participants used successfully to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy.

Merriam and Tisdell (2016) cited interviews as the best technique to use to conduct intensive case studies of a few selected individuals. The advantage of in-depth interviews is that interviews involve the collection of data about a research topic through the reconstruction, exploration, and interpretation of the participants' experiences (Denzin & Lincoln, 2018). In addition to data collection, other benefits of interviews include the opportunity to immediate follow-up and seek clarification of information (Marshall & Rossman, 2016). I used semistructured face-to-face interviews as my data collection technique to conduct intensive case studies of four small business leaders. I used in-depth interviews that allowed the participants to reconstruct, explore, and interpret their experience as BPO service providers. In addition, I followed-up and clarified information throughout the data collection process.

Conversely, Merriam and Tisdell (2016) noted biases, predispositions, and attitudes of both the researcher and participant as possible limitations of interviews that affect the interaction and data elicited. Marshall and Rossman (2016) identified time constraints, trust in the relationship between the participant and interviewer, and misinterpretation of questions and responses as potential limitations of interviews. Moreover, another potential disadvantage of interviews involves the time-consuming task of transcribing audio recordings (Saunders et al., 2016). I conducted interviews in a respectful, nonjudgmental, and professional manner to establish trust in the relationship, while motivating participants to openly share and clarify their thoughts and experiences. In addition, I catered to participants' schedule and availability to reduce or eliminate time constraints. Finally, I personally transcribed audio recordings of the interviews to enhance the member checking process.

Marshall and Rossman (2016) stated that researchers use document review as a data collection technique to find information related to the case study. As a data collection technique, I reviewed company documents and records, such as capability statements, mission statements, websites, brochures, policies and procedures, employee handbooks, contracts, agreements, and other company documents related to the overarching research question. Researchers use document review to establish the start and finish of events or important characteristics and to summarize data (Yin, 2018). However, drawbacks occur because researchers may interpret data differently (Merriam & Tisdell, 2016). Because the benefits outweigh the drawbacks, I used document review in this study as a data collection technique.

Participant collaboration, in the form of member checking, provides the opportunity for participants to review the researcher's written interpretation of the interview recordings to confirm accuracy, make comments and corrections, and validate the information (Saunders et al., 2016). Member checking allows researchers to ensure internal validity, credibility, ruling out the possibility of misinterpretation of the participant's words, perspective, and context, while helping the researcher identify any biases and misunderstandings (Merriam & Tisdell, 2016). Furthermore, member checking helped me identify and eliminate any biases and misunderstandings in my interpretation while ensuring internal validity, credibility, and trustworthiness. Seidman (2013) stated that researchers interested in developing a sharing and mutually beneficial relationship with the participant during the data collection process and explicitly outline the member checking process prior to the interview, create conditions conducive for member checking. I used member checking to confirm the accuracy of my interpretation of the participant's words, perspectives, and context of the strategies they used to become BPO service providers to increase revenues, by giving participants my interpretation of their interview responses for validation purposes to achieve data saturation. The participants reviewed the interpreted transcripts to make sure the information was accurate and reflected what was said. This process was repeated until the participant confirmed the accuracy of their interpreted answers to interview questions.

Data Organization Technique

Researchers use codes, logs, journals, and labeling systems to organize data by types, dates, persons, times, and places throughout the data collection process (Marshall

& Rossman, 2016). Merriam and Tisdell (2016) concluded that interview transcripts, notes, reports, records, and other data require a method of organization that allows easy retrieval of information. Yin (2018) suggested the creation of a case study database to orderly compile of all the data before beginning data analysis. Researchers who organize their data tend to conduct rigorous research (Yin, 2018). I used recording devices, external hard drive, logs, journals, codes, and catalog-labeling systems to organize the data collected. Additional steps to organize documentary data included assigning document identifiers, converting paper documents to electronic documents, and filing the electronic documents in dedicated folders. Furthermore, I housed electronic transcripts, notes, recordings, research logs, reflective journal, and other data in designated password-protected folders on an external hard drive. These steps helped facilitate security, organization, and easy retrieval of data.

The designation of codes as part of organizing and managing data involves assigning identifiers to various aspects of data (Merriam & Tisdell, 2016). The use of pseudonyms helps disguise the identity of each participant to ensure confidentiality (Denzin & Lincoln, 2018). Saunders et al. (2016) posited that using pseudonyms instead of participants' names, the names of others mentioned by participants, and the names of places mentioned to provide a way of ensuring anonymity. I assigned individual identifiers to participants that consisted of the letter P and a number for the individual and the letter C and a number for the company. Company number two had two participants so the participant codes are as follows: P1C1, P2C2, P3C2, and P4C3. In addition, I transcribed each participant's interview answers, allocated the assigned participant

identification code, and removed identifying information from interview transcript. The use of participants' identification codes on all data ensures anonymity (Denzin & Lincoln, 2018).

Some researchers choose to manually organize and manage data (Denzin & Lincoln, 2018). However, Merriam and Tisdell (2016) discussed how the extensive use of computer software programs by researchers for data management evolved into a subfield labeled computer assisted qualitative data analysis software (CAQDAS). CAQDAS does not replace the researcher in analyzing data but serves as a tool to help code and categorize data (Yin, 2018). Saunders et al. (2016) concluded that the systematic use of CAQDAS aids in continuity, efficiency, transparency, and methodological rigor of data management, retrieval, and analysis. I purchased NVivo 11 Plus and used the software to code, categorize, track, file, and organize raw data, such as audio recordings of interviews, interview transcripts, notes, memos, documents reviewed, and other relevant data. Furthermore, the use of NVivo 11 Plus helped improve efficiency, transparency, and methodological validity in data organization, management, and analysis. In addition, keeping data in NVivo 11 Plus helped improve continuity, data organization, and retrieval during data analysis.

Prior to conducting interviews, researchers explore their own experiences to examine dimensions of the research to identify personal prejudices, viewpoints, assumptions, and biases (Merriam & Tisdell, 2016). Van Manen (2014) explained *epoche*, as a process used by researchers to bracket biases to help researchers focus on the experience of the participant to capture detailed descriptions of the experience. Saunders

et al. (2016) suggested that keeping a reflective journal helps researchers document the research process, record what happens, and identify lessons learned from what goes right and wrong, and demonstrate transparency during the research process. Furthermore, researchers take notes to reflect on what worked or not in gaining access, maintaining access, ethics, and data gathering (Marshall & Rossman, 2016). I kept a reflective journal to bracket biases, focus on the participants' experiences to get rich descriptions, and document the research process. In addition, I noted details of the research process, such as reactions to the interview process and setting, thoughts and ideas during document review, decisions about coding and theme identification, and lessons learned about what proved effective or ineffective during the protocol. I demonstrated transparency throughout the research process.

Saunders et al. (2016) highlighted the principles and legislation for data protection and management in relation to the processing, storing, and moving of personal data. The identification of the principles and definitive legalities helps determine the implications and approach to collecting, processing, and storing data for a research project (Saunders et al., 2016). While conducting the study, Walden University requirements state that all raw data, external storage devices, and paper copies must be in a locked safe when not in use. In addition, the requirements indicated that upon completion of the study, all raw data including external storage devices, and hard copies must remain locked in the safe for 5 years and then destroyed. To abide by Walden requirements, I stored all data in a locked safe while conducting the study. After completion of the study, I locked all raw data including external storage devices and hard copies in a safe and will keep them there

for 5 years to prevent unauthorized access to the information. Per Walden requirements, after 5 years, I will physically destroy external hard drives containing the raw data and shred all hard copies.

Data Analysis

Marshall and Rossman (2016) argued that triangulation of data sources, methods, theories, and investigators provides robust validity of specific knowledge claims.

Researchers triangulate data to explore a phenomenon from different perspectives and levels, using data collected from various sources such as interviews and review of documentation (Fusch & Ness, 2015). There are four types of triangulation methods, including data, investigator, theoretical, and methodological (Marshall & Rossman, 2016). Yin (2018) defined data triangulation as determining consistency of a finding through converging data from multiple sources. Merriam and Tisdell (2016) referred to data triangulation as the comparison and cross check of interview data collected from people with different perspectives or follow up interviews with the same people.

Saunders et al. (2016) stated that data triangulation involves using more than one source for data collection to substantiate the validity, credibility, and authenticity of research data, analysis, and interpretation. In contrast, investigator triangulation refers to a second and third author to review the primary author's analysis to validate research conclusions (Merriam & Tisdell, 2016). Theoretical triangulation involves researchers analyzing data from two separate theories (Yin, 2018). Lastly, researchers use methodological triangulation to increase validity by combining data collection procedures to determine cause and effect (Fusch & Ness, 2015) during data-gathering procedures

(Marshall & Rossman, 2016). Because I did not employ quantitative data, a second and third author, or multiple theories in my study, I used methodological triangulation to analyze collected data in this study. Researchers use methodological triangulation to reveal the richness and depth of data collected (Fusch & Ness, 2015). Using methodological triangulation allowed me to reveal the richness and depth of data collected from various sources, such as semistructured interviews and company documentation, confirming the validity, credibility, and authenticity of the data, analysis, and interpretation. I compared the member checked interview transcripts with the information I reviewed from company documents and records, such as capability statements, mission statements, websites, brochures, policies and procedures, employee handbooks, contracts, agreements, and other company documents related to the overarching research question to ensure alignment of information.

Data were compiled and organized, disassembled into fragments, reassembled into sequence of groups, and interpreted for meaning (Yin, 2018). Marshall and Rossman (2016) described qualitative data analysis as a search for general statements about relationships and underlying themes through a process of order, structure, and interpretation of a mass of collected data. Saunders et al. (2016) identified thematic analysis (TA) as a flexible, orderly, and logical approach to analyze qualitative data. TA allows researchers to have a systematic process to code data from interviews, observations, documents, and other data sources related to the overarching research question to identify themes for further analysis (Saunders et al., 2016). I used TA to examine, categorize, code, and integrate qualitative data collected from interpreted

interview data, notes, secondary sources, and the literature. Furthermore, I identified key themes for further exploration to develop and test explanations and theories based on relationships of these themes. Finally, I formulated and verified conclusions based on the results of the study.

Corbin and Strauss (2015) identified open, axial, and selective as the three types of coding. Theme construction begins with open coding, which is the process of making notations next to bits of data potentially relevant to answer the research question (Merriam & Tisdell, 2016). Next, axial coding helps identify relationships between conceptual categories of data that emerge from open coding (Marshall & Rossman, 2016). Finally, selective coding, which helps researchers identify the core category to integrate, recognize, and develop relationships between principal categories that emerge to formulate an explanatory theory (Saunders et al., 2016). Researchers use CAQDAS as a tool to provide easy access to tabulate, shift, and retrieve data (Corbin & Strauss, 2015). CAQDAS enables researchers to classify, sort, file, and reconnect interview data based on designated codes determined by the researcher (Denzin & Lincoln, 2018). Merriam and Tisdell (2016) described how CAQDAS proved useful with the three stages of data management. The first stage, data preparation, involves typing notes, transcribing interviews, entering, editing, and formatting data (Merriam & Tisdell, 2016). The next stage, data identification, enables researchers to determine and assign codes to segments of interviews, notes, documents, audio files, and other data to observe possible links and relationships among the various aspects of the data (Merriam & Tisdell, 2016). The third stage, concept and mind mapping, allows researchers to visualize the relationships among

codes and themes with a visual model (Merriam & Tisdell, 2016). I used NVivo 11Plus CAQDAS as a tool to type notes, transcribe interviews, enter, edit, and format data. In addition, I assigned open, axial, and selective codes to segments of interviews, notes, documents, audio files, the literature, and other data in NVivo 11 Plus to observe, identify, and map themes. Furthermore, I used concept mapping to help me identify themes and reveal linkages between themes, related literature, and the conceptual framework I selected for this study.

Reliability and Validity

Researchers must provide reliable and valid information in an ethical manner to affect the practice or theory of a field (Merriam & Tisdell, 2016). Many researchers argued that the basis of assumptions used in qualitative research differ from the paradigm of quantitative validity and reliability (Merriam & Tisdell, 2016). Lincoln and Guba (1985) proposed more suitable criteria for defining and assessing the reliability and validity of qualitative research through the concepts of dependability, credibility, transferability, and confirmability.

Reliability

Qualitative researchers use dependability as the criteria to assess the reliability of research information (Merriam & Tisdell, 2016). Lincoln and Guba (1985) proposed dependability as an alternative to the traditional quantitative reliability criteria for judging the soundness of qualitative research. Saunders et al. (2016) defined dependability as a parallel criterion to reliability used to produce a reliable account of the research focus to allow others to understand and evaluate the information.

Creswell and Creswell (2017) established a list of procedures to ensure the dependability and usefulness of a qualitative study. One procedure, member checking, entails getting a perspective through the lens of the study participants (Creswell & Creswell, 2017). Member checking involves providing participants with interpreted interview data and allowing participants to verify that what they originally stated during the interviews did not change (Fusch & Ness, 2015). Allowing participants to correct and confirm the researcher's interpretation of interview data through member checking ensures dependability of the findings (Marshall & Rossman, 2016). I engaged in member checking with study participants, by interpreting participants' transcribed recorded interview responses and sharing the transcribed interpretation with study participants for validation purposes. I used member checking to confirm the accuracy of my interpretation of the participant's words, perspective, and context of the strategies they used to become BPO service providers to increase revenues, by giving participants my written interpretation of their interview responses for validation purposes to achieve data saturation. The participants reviewed the interpreted transcripts to make sure the information was accurate and reflected what was said. This process was repeated until the participant confirmed the accuracy of the information, interpretation, and no new information was obtained.

Recording the interview sessions allows researchers to preserve the verbatim conversations and to review, become familiar with, transcribe, and interpret the information collected to conduct member checking and data analysis (Merriam & Tisdell, 2016; Saunders et al., 2016; Marshall & Rossman, 2016). Marshall and Rossman (2016)

argued that researchers should ask participants to elaborate and clarify their answers to ensure depth, relevance, and avoidance of adding any of the researchers' biases to the data collected. I asked participants to elaborate and clarify their answers to ensure depth, relevance, and avoidance of adding any of my biases to the data collected.

Several authors suggested that researchers keep the results of interviews in context to produce reliable and objective data and avoid tainting the participants' perspectives (Corbin & Strauss, 2015; Denzin & Lincoln, 2018). Giving participants relevant information about themes before the interview promotes credibility, validity, and reliability by informing the interviewee about the information of interest for the study and providing the opportunity to prepare supporting company documents (Corbin & Strauss, 2015; Denzin & Lincoln, 2018; Saunders et al., 2016). In order to produce more reliable and objective results, I provided participants with relevant information prior to the interview, allowed the opportunity to assemble supporting company documents and records, and kept the results of the interview in context to prevent tainting the participants' perspectives.

Validity

Researchers use credibility, transferability, and confirmability as criteria to assess the validity of information in qualitative analysis (Merriam & Tisdell, 2016). Many researchers refer to these criteria collectively as trustworthiness (Houghton, Casey, Shaw, & Murphy, 2013). By ensuring the trustworthiness of a qualitative study, researchers address the equivalent of validity aspects of a quantitative study.

Credibility. The credibility criteria involve judging the results of qualitative research from the perspective of the study participants (Trochim, Donnelly, & Arora, 2016). Creswell and Creswell (2017) stated that the use of member checking shifts the validity procedure from the researcher to the participants to confirm the credibility of interview data. Saunders et al. (2016) suggested that the use of semistructured, in-depth, qualitative interviews helps researchers build trust and rapport and collect sufficient data. Saunders et al. argued that member checking enables participants to check the researcher's interpreted interview data for accuracy and completeness. I used qualitative, semistructured, face-to-face interviews, member checking, and review of company documents and records to collect additional data and build trust and rapport with study participants. I used member checking to allow participants to review interpreted interview data for accuracy and completeness, which allowed me to ensure the credibility of interview data.

Lincoln and Guba (1985) offered a set of procedures to meet standards of trustworthiness and validity of qualitative research. Methodological triangulation, one of the procedures, allows researchers to ensure validity of the study by gathering data from multiple sources (Lincoln & Guba, 1985). In addition, researchers use review of company documentation, interview notes, and reflective journal entries as secondary data sources to use for triangulation (Fusch & Ness, 2015). Merriam and Tisdell (2016) posited that triangulation of data is a strategic approach to obtain consistent and valid data for a qualitative study. Triangulation of data sources allows researchers to ensure credibility with the accurate, objective, and unbiased representation of the research topic (Marshall

& Rossman, 2016). I used methodological triangulation to analyze collected data in this study. Researchers use methodological triangulation to reveal the richness and depth of data collected (Fusch & Ness, 2015). Using methodological triangulation allowed me to reveal the richness and depth of data collected from various sources, such as semistructured interviews and company documents and records, confirming the validity, credibility, and authenticity of the data, analysis, and interpretation. I compared member checked interview transcripts with company documents and records, such as capability statements, mission statements, websites, brochures, policies and procedures, employee handbooks, contracts, agreements, and other company documents related to the overarching research question to ensure alignment of information.

Transferability. The concept of transferability refers to criteria used to assess the validity of qualitative research refers to providing thorough and rich descriptions of cases, contexts, and assumptions central to the research study to apply study results from one study to another (Trochim et al., 2016). Saunders et al. (2016) stated that transferability exists when qualitative researchers test an existing theory, relate the findings of a qualitative research project to a pre-existing theory, or demonstrate that the findings produce a broader theoretical significance beyond the research project. Merriam and Tisdell (2016) found that the presentation of rich thick descriptions of the setting, participants, and details of the findings of a qualitative study is a strategy to ensure transferability. I provided rich, thick, and thorough descriptions of cases, settings, contexts, assumptions, and findings of my study to allow readers to determine the

applicability of the findings. In addition, I demonstrated the broader theoretical significance of the findings by suggesting areas of future research.

Confirmability. Researchers (Marshall et al., 2015; Yin, 2018) considered confirmability as the final criterion to assess the validity of information in qualitative analysis because confirmability takes place after the researcher establishes dependability, credibility, and transferability. Confirmability refers to the researchers' ability to demonstrate that the research data represent the actual interpretation of study participants without the researchers' biases (Trochim et al., 2016). I made conscious efforts to listen to each interviewee and record my thoughts, insights, and biases. I focused on interpreting interview answers carefully, establishing a connection between data and results, and used existing literature review to increase the confirmability of the results. Another strategy to enhance confirmability involves the researcher searching for and describing negative instances that contradict prior observations (Trochim et al., 2016). Patton (2015) stated that negative case analysis helps researchers present data that fails to support contrary explanations. Saunders et al. (2016) concluded that negative cases help researchers confirm the validity of the data, explain why negative cases occur, and avoid unreliable interpretations based on personal opinions. I searched and identified negative cases and alternative explanations during the data collection and analysis process. Furthermore, I looked for alternative explanations to test against the data to confirm that the results withstand negative cases and enhance the validity of the conclusion of my study.

Saunders et al. (2016) defined data saturation as the continuation of qualitative data collection, such as conducting additional interviews, until the additional data collected provide little or no new information. In addition, researchers achieve data saturation when the repetition of patterns and themes occur without gaining any additional information (Marshall & Rossman, 2016). Data saturation occurs when continued data collection produces no new insights into the research topic (Merriam & Tisdell, 2016). I conducted additional interviews to member check interpreted transcripts and no new themes emerged. In addition, I reviewed company documents and records such as capability statements, mission statements, websites, brochures, policy and procedures, employee handbooks, contracts, agreements, and other company documents related to the overarching research question. Finally, I triangulated primary and secondary data sources to ensure alignment of the information.

Transition and Summary

In Section 2, I wrote an in-depth description of the purpose of the study, role of the researcher, participants, research method and design, population and sampling, and ethical research guidelines. Furthermore, in Section 2, I outlined the data collection instruments, data collection techniques, data organization techniques, data analysis, and reliability and validity of the study. I explored strategies used by small business leaders to enter the BPO market as service providers that began with the role of researcher as the main data collection instrument in the process using semistructured interviews to collect data from interview participants. Small business leaders served as participants in the study to share strategies used to enter the BPO market as service providers. I used the

qualitative method to prioritize the quality and depth of the data collected. I used the case study design to answer the research question. Purposeful sampling allowed me to establish the selection criteria for the four participants. I interviewed participants using face-to-face, semistructured interviews.

I used recording devices, NVivo 11 Plus software, logs, external hard drives, journals, and codes to organize, code, categorize, track, and file raw data collected. This also helped improve efficiency, transparency, and methodological validity. The data analysis process involved methodological triangulation of data to explore the phenomenon from different perspectives and levels to increase reliability and validity. I conducted the entire study in an ethical manner according to the requirements.

The information I discuss in Section 3 includes an introductory purpose statement and a summary of the findings of the study. I also include the presentation of findings, application to professional practice, and implications for social change. I conclude Section 3 with reflections of the experience and recommendations for action and further research.

Section 3: Application to Professional Practice and Implications for Change

In Section 3, I provide an overview of the purpose of the study, state the research question, and present the findings. In addition, I include the applications of my research study to professional practice, implications for social change, and recommendations for action and further study, and reflections. Finally, I conclude with closing statements for the study.

Introduction

The purpose of this qualitative multicase study was to explore strategies small business leader use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. I conducted semistructured, face-to-face interviews with four business leaders from three small businesses who (a) operated a business in metropolitan Atlanta with less than 100 employees and revenue less than \$10 million, (b) possessed at least 5 years of successful experience as a service provider in the BPO market, (c) implemented strategies that led to increased revenue, and (d) agreed to participate in semistructured interviews, and member checking and to provide information and documentation. I reviewed other company documents and records, such as capability statements, mission statements, websites, brochures, policy and procedures, employee handbooks, contracts, agreements, and other company documents pertinent to entry into the BPO market as service providers. Upon analyzing data collected, three themes emerged, which are as follows: (a) using professional resources and personal qualities to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy, (b) entering into trade contracts with BPO clients to enter the

BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy, and (c) establishing and building on relationships with BPO clients to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. Theme 1 has two subthemes, which are previous professional experiences and knowledge and personal skills.

Presentation of the Findings

The overarching research question for this qualitative multicase study was as follows: What strategies do small business leaders use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy? I conducted semistructured, face-to-face interviews with four business leaders from three small businesses and reviewed company documents and records to answer the overarching research question. The following three themes emerged after coding, triangulating, and analyzing data collected:

- Using professional resources and personal skills to enter the BPO market increased revenue.
- Entering into trade contracts with BPO clients increased revenue.
- Establishing and building on relationships with BPO clients increased revenue.

Theme 1: Using Professional Resources and Personal Skills to Enter the BPO

Market Increased Revenue

The first theme that emerged from data analysis was using professional resources and personal skills to enter the BPO market increased revenue. Within Theme 1, I

identified two subthemes from conducting semistructured interviews with the four participants and reviewing company documents and records. The two subthemes are small business leaders' previous professional experiences and knowledge and personal skills.

Previous professional experiences and knowledge. The previous professional experiences and knowledge subtheme consisted of (a) previous work experiences in the private and public sectors; (b) comprehension of policy and culture within an organization; and (c) formal education, professional training, and networking. All four participants noted that previous professional experiences and knowledge are resources participants used as a strategy to enter the BPO market as service providers. P1C1, P3C2, and P4C3 indicated that work experiences in the private sector provided an entry into their current business industry. In addition, P2C2 noted that previous work experience in the government sector served as a source to understand how to do business with the government and to formulate an effective strategy to enter the BPO market as a service provider. Furthermore, the review of company records and documentation identify the participants' professional experience, training, certification, and education, as it relates to the business and industry.

P1C1 indicated that the experiences and knowledge garnered from working at various levels throughout a corporate career, from entry level to executive management, helped lay the foundation to formulate a strategy to enter the BPO market as a service provider. In addition, P1C1 indicated that working at various levels of management helped realize the importance of policy, culture, networking, and identifying and using

resources to maintain a successful business model. Furthermore, P1C1 stated that formal education and professional training also played a pivotal role in strategy formulation by providing exposure to academic elements of business management, marketing, and accounting. P1C1 remarked that,

I learned business at every level as an employee, which proved useful when I started my business. Networking with potential clients helped initiate relationships and identify business opportunities. My formal education helped me understand how to put all the pieces of the business puzzle together to create and maintain a successful business model.

Suominen, Almobaireek, Alshumaimeri, and Manolova (2016) found that business owners with prior work experience in an industry perform better than those without this experience. Shu, Ren, and Zheng (2018) noted that entrepreneurs with prior knowledge and experience influence the recognition of opportunities because entrepreneurial opportunities are not open to everyone despite their objective existence. Barcia and Umihanic (2016) identified factors that enable entrepreneurial opportunity recognition in some individuals and not others.

P2C2 indicated that years of experience working in the Federal Government, at the management and executive leadership levels, provided exposure to the business opportunities available to small businesses and the regulatory side of government. P2C2 stated that,

My college degree was an instrumental part of my background. Working for the Federal Government exposed me to opportunities available to small businesses

and taught me how to effectively network and handle the bureaucracy involved in doing business with the Federal Government. Understanding the policies and culture of the Federal Government are key elements to getting things done.

Chen, Chang, and Chiang (2016) found that an entrepreneur's business and government ties prove conducive to their career achievement, entrepreneurial satisfaction, and firm profitability. Internal knowledge from prior knowledge or experience influences the recognition of business opportunities (Shu et al., 2018). P3C2 reiterated that professional experience and knowledge gained from a corporate career helped formulate a formal structure and policy for the business. Ayakwah, Sepulveda, and Lyon (2018) found that businesses with more formal business structures tend to have less horizontal competition and more vertical cooperation. P3C2 stated, "My responsibility is to make sure we have standards and the appropriate model. We want an embedded place where our people can go to find various measurements for activities and behaviors." Understanding the relationship between competition and cooperation and the manner in which this relationship shapes opportunities for small businesses proved critical for policy direction (Ayakwah et al., 2018).

P4C3 developed the desire to start a business while working in a corporate setting to take advantage of a business opportunity to become a BPO service provider. The company policy indicated that employees desiring to take advantage of this opportunity had to have resigned from the company at least 1 year prior to applying for the business opportunity. Suominen et al. (2016) found that the establishment of inter-firm relations offers numerous benefits to entrepreneurial ventures. Kacperczyk and Younkin (2017)

found that performing various duties during employment increase the likelihood of entrepreneurial success. Sun (2014) examined how former employees create new identities as service providers for the former employer. P4C3 stated that,

I resigned from the company, opened my business and, after 1 year, I applied to become a BPO service provider for the company. Knowing the industry, policies, internal operations, and culture of my previous employer gave me an edge. I was awarded a contract as a BPO service provider.

Each company's brochure, capabilities statement, and website cite the experience of the small business leader in the industry. All the participants had awards and plaques on display in their offices from various clients, government agencies, and business organizations recognizing their accomplishments in the industry. Leaders using inter-firm networks gain access to capabilities and resources, avoid competition in the open market, and add legitimacy through partner endorsement (Suominen et al., 2016).

Personal skills. All four participants believed that personal skills serve as a vital resource for small business leaders. The participants specifically indicated that effective listening and communication skills proved useful as resources to enter the BPO market as service providers. All four participants emphasized that effective listening and communication skills were essential in the formulation and implementation of strategies to enter the BPO market as service providers, increase revenue, and avoid the likelihood of bankruptcy.

Small business leader participants (P1C1, P2C2, P3C2, and P4C3) regarded effective listening and communication skills as essential tools used throughout business

operations. P1C1 shared that listening to, and communicating with, clients and employees helped identify areas for improvement and opportunity. P2C2 shared that, “my ability to listen and communicate are my best personal assets that I use in my business.” P3C2 noted that, “P2C2 is a great listener and is able to mine information and paint a picture of where we want to go.” In addition, P4C3 indicated that, “listening to the positive and negative feedback from customers helps me identify what works and areas of concern . . . I must communicate to employees and contractors how to address the issues.” Spataro and Bloch (2018) found that listening is a critical communication skill.

Other personal skills that emerged from data analysis were leadership and management skills. All four participants indicated that providing effective leadership and management helped establish the culture of the company. P3C2 and P4C3 expressed the importance of leading by example to establish credibility. P3C2 remarked that,

. . . P2C2 does an excellent job modeling the kind of behavior and attitude we want to see within our organization. P2C2 is quick to correct behavior that doesn't align with the culture of the company. P2C2 does this in a very positive, professional, and tactful manner and is not afraid to identify and address issues right away. That kind of modeling of behavior is the key to creating and maintaining the culture, accountability, and professionalism shown within the company.

Furthermore, P4C3 stated that,

management needs to know the business, conduct themselves with integrity, be firm and fair. We must be the example by not just talking the talk but walking the

walk. We don't do things we're not supposed to do. There are certain things that are non-negotiable.

Gadaginamath (2016) found that mandatory skills an entrepreneur must have to ensure success of a venture are interpersonal, leadership, and basic management skills. The company policies and procedures, employee handbooks, contracts, and agreements include the expectations and commitments of the personnel. The mission and capability statements help describe the company's culture.

Correlation to the literature. The findings noted in theme 1 aligned with the findings of Obeng et al. (2014) that identified intangible resources as relationships, culture, employees' knowledge, experience, qualities, firm reputation, brand name, trade contacts, and organizational procedures. In addition, intangible assets, such as intelligence and knowledge, comprise what leaders must acquire and develop as part of their resources to gain a CA (Pop et al., 2014). Furthermore, leaders must manage knowledge, a strategic resource, because of its role in the formulation of winning strategies (Dayan, Heisig, & Matos, 2017). Spataro and Bloch (2018) noted that active listening surpasses simple hearing by allowing the listener to establish a deeper connection with the speaker through inquiry, reflection, respect, and empathy. Furthermore, nonformal and informal learning support the development of competencies that enable entrepreneurs to increase networking opportunities, resource utilization, new technology utilization, and new opportunity options (Serafimova & Gjorgioska, 2016).

Correlation to the conceptual framework. Theme 1 relates to Penrose's (1959) and Wernerfelt's (1984) RBV framework by viewing firms as broader sets of resources.

Penrose (1959) concluded that combinations of resources led to incomparable opportunities that resulted in growth and consequent financial outcomes. The performance and survival of a business depend on the way organizational leaders use resources to obtain distinctive capabilities that lead to a CA (Mathur et al., 2014). Sonfield (2014) related the RBV framework to the renewal and enhancement of resources. In the context of this study, small business leaders used resources to enter the BPO market as service providers, increase revenue, and reduce the likelihood of bankruptcy. Won (2015) explained the influence of entrepreneurship subjectivity and the role Penrose's and Wernerfelt's frameworks play in outsourcing strategies and decisions. In addition, entrepreneurial judgment based on personal impression defines the characteristics of new opportunity (Won, 2015). Won concluded that these characteristics determine the relationship among existing businesses, new opportunities, and resource value. Gancarczyk (2016) identified (a) decisional criteria, (b) structural elements, and (c) an evolutionary approach to decision making as the three levels of the entrepreneurial growth process.

Theme 2: Entering into Trade Contracts with BPO Clients Increased Revenue

The second theme that emerged from conducting data analysis was entering into trade contracts with BPO clients increased revenue. I identified two subthemes from analysis of data collected from company documents and records and semistructured interviews with the four participants which are the duration of contracts and position held in contracts. I present a discussion of these two subthemes below as they relate to the strategies used.

Duration of contracts. P1C1 explained that the pursuit of short-term contracts, under 1 year, requires more resources than obtaining long-term contracts and could prohibit the success of the company. P1C1 stated that,

As a small company, resources are limited. It requires more resources to continually go after short term revenue drivers than it does to generate long term contracts. If you don't have the resources to support the strategy to continuously go after short term revenue drivers, it can be tedious, frustrating, and lead to failure.

In addition, P1C1 confirmed that the strategy to pursue long-term contracts resulted in most of the contracts awarded to C1 cover a period from 3 to 5 years. Furthermore, multi-year contracts positioned C1 to service those contracts and fulfill the obligations. P2C2 and P3C2 agreed that the strategy to obtain long-term contracts helped them stay in business, plan for growth of the company, and remain in the forefront of the market. P2C2 noted that a 2-year contract that generated more than \$1 million in revenue took C2 to another level. P2C2 stated that, "pursuing long-term contracts, which are 2 years or longer, was a strategy I used to enter the BPO market, grow the business, increase revenue, and stay relevant to our clients."

P4C3 indicated that the initial BPO opportunity available through the previous employer was for 3 years with potential for longer terms. P4C3 explained that,

The business opportunity was in Georgia. I lived in another state and had to relocate my family and business. My strategy was to use the initial 3-year contract

period to establish and grow my business to pursue longer-term contracts. Now my contracts are for 5 years.

The review of participant firms' contracts with BPO clients indicated terms of more than 1 year. Zhang, Ma, and Qu (2017) found that, when outsourcing, risks are greater with short-term contracts, leading to opportunistic behavior because maximizing profits becomes the priority. Teixeira (2014) concluded that firms may use long-term contracts as a risk management device. Outsourcing to the spot market involves price uncertainty (Teixira, 2014). Arve (2016) suggested that long-term contracts, usually based on expected future demand, should provide for the possibility of upward adjustments.

Position held in contracts. P1C1, P2C2, and P3C2 agreed that entering the BPO market as a Tier 2 supplier and subcontractor was an effective entry-level strategy but not one to achieve and maintain sustainability. Assisting tier 1 suppliers and prime contractors fulfill contract obligations brought in revenue, exposed C1 and C2 to the market, and positioned C1 and C2 to become tier 1 and prime contractors, but prohibited control of the contract. P1C1 looked at the overall market and the competition in the metropolitan area to strategically determine the niche contracts worth pursuing. P1C1 stated that, "I analyzed the market potential, competition, company resources, and growth potential to distinguish which contracts provided the best opportunity for C1."

P2C2 indicated that taking advantage of programs that required the participation of disadvantaged business enterprises (DBEs) provided limited opportunity to enter the BPO market. P2C2 stated that,

The strategy to gain entry to the BPO market using the DBE status was temporary because the size of the proverbial DBE pie is limited. If you are not the tier 1 or prime contractor, you don't have control of the contract.

P2C2 noted that C2 has been the prime contractor and tier 1 supplier for contracts servicing large and small businesses. P2C2 added that, "we were positioned to hire tier 2 and subcontractors to fulfill the contract requirements." P4C3 entered the BPO market as a prime contractor and hired subcontractors to fulfill the requirements of the contracts. The prime contractor has full control and management of the contract, which is an advantage. P4C3 stated that, "getting subcontractors is not as difficult as managing them. We hire companies that are experienced in the industry and ready for the job. Our managers make sure the subcontractors comply with the terms of the contract."

The company documents and website list the participating company's position as the prime contractor for several contracts awarded to the company. Certifications from various government agencies and business organizations confirmed the capability and experience of the company, in the industry, to qualify as prime contractors. This information confirms the responses provided by each participant, as the information relates to the position held in the contract. Walczyk (2016) noted that resources and skills necessary for the success of some business entities are located outside the firm and beyond the direct control of its management team. Lack or loss of control remains a typical concern that constrains outsourcing activities (Zhang et al., 2017). Zhang, Liu, Tan, Jiang, and Zhu (2018) referred to BPO projects as ventures where service providers accept, manage, and control business processes.

Correlation to the literature. The findings reported in Theme 2 align with Marshall et al.'s (2015) concept that small business leaders' successful management of BPO market contracts against the external demands and threats could lead to organizational sustainability. McIvor (2016) noted that many formal BPO contracts and service-level agreements contain process improvement techniques (PITs). Leaders could use these PITs to improve performance by eliminating inefficient processes, increasing service quality, and delivering cost savings (McIvor, 2016). The cost-savings and access to resources in outsourcing arrangements are usually arranged through contract-based agreements (Duan et al., 2014). Furthermore, Espino-Rodriguez and Ramirez-Fierro (2017) found that CA and activity determine the management of outsourcing based on performance.

Correlation to the conceptual framework. Theme 2 relates to Penrose's (1959) and Wernerfelt's (1984) RBV framework by viewing contracts as resources. Zhang et al. (2017) considered contracts as resources with the potential to create CA. Gorovaia and Windsperger (2018) suggested that BPO partners design contracts to facilitate knowledge creation and transfer. In addition, contract design provides a source of CA (Gorovaia & Windsperger, 2018). Meehan, Menzies, and Michaelides (2017) found that organizations possess and have access to resources and capabilities that provide a foundation for the survival, growth, and overall effectiveness of organizations. Furthermore, resource-based reasoning explains the knowledge creation and transfer mechanism functions of contracts to determine contract duration (Gorovaia & Windsperger, 2018). Contract duration functions economically to mitigate the increase in costs and other uncertainties as it

relates to specific investments and to facilitate the sharing of knowledge (Gorovaia & Windsperger, 2018).

Theme 3: Establishing and Building on Relationships with BPO Clients Increased Revenue

The third theme that emerged from the data was establishing and building on relationships with BPO clients increased revenue. I identified three subthemes associated with theme 3 from the analysis of data collected from semistructured interviews and company documents and records. The subthemes are: (a) using networking and referrals to establish and build on relationships, (b) using solutions and innovations to build on relationships, and (c) remaining relevant in relationships.

Using networking and referrals to establish and build on relationships.

Providing quality service increases customer satisfaction and the likelihood of client recommendations, which results in stronger relationships and enhanced future cash flow (Eggert, Bohm, & Cramer, 2017). All four participants emphasized the importance of networking and referrals to establish business relationships. P1C1 expressed that being involved in organizations that render occasions to meet and work with people to gain information and access to business opportunities enables business leaders to introduce themselves and their companies to other business leaders and organizations. P1C1 stated that, “I have established relationships doing old school networking and getting referrals.”

P2C2 indicated that, “using networking and referrals as part of the strategy helped identify relevant organizations that put me in a pool of decision makers who could provide me with the names of potential clients.” In addition, P2C2 noted that, “the

organizations identified also provided opportunities to learn about new trends and industries.” Furthermore, P2C2 credited the growth of the business, increase in revenue, and building of the brand to networking and getting referrals within that population of organizations. P3C2 stated that, “P2C2 mines information from networking activities to move the business forward.”

P4C3 suggested that networking provided valuable input that helped avoid costly mistakes. Furthermore, P4C3 stated that, “you learn something new about your clients, their needs and expectations, and how your business can meet those needs and expectations. When you know something isn’t right, you must address those concerns.” According to P4C3, networking led to referrals based on the confidence gained through established relationships.

The participants’ company documents and records, specifically the brochures, websites, and mission statements, highlight the importance and value of the client relationships. Many BPO arrangements go beyond contract-based arrangements to involve relational governance mechanisms, such as partnerships and alliances (Duan et al., 2014; Richards, 2017). Firms seek deeper social bonds rather than contractual arrangements between partners in the BPO relationship (Duan et al., 2014; Richards, 2017). McIvor (2016) found that collaborative client-vendor relationships include the presence of relational mechanisms, such as trust and information sharing.

Using solutions and innovations to build on relationships. P1C1 stated that from the perspective of the client and service provider, innovation remains an important

element in providing solutions to the various challenges of the rapidly changing business environment. According to P1C1,

As we operate in this rapidly changing business environment, we have to identify and adapt to the wave of the future. Innovation is a big part of it. Innovation in the workplace is a challenge for clients. It is very important to rapidly respond to the changes in the industry.

In addition, P1C1 concluded that leaders have to find innovative solutions to respond to the rapid changes and maximize the benefits for the client and service provider. P2C2 found that using relationship-building activities as a form of innovation to evaluate the client's operation allowed P2C2 to identify challenges and provide solutions to those challenges. P2C2 stated,

While working in one area of the business, we discovered that processes were centered around project-based management and consulting. This discovery took us deeper into the client's organization beyond our initial role and allowed us to get feedback from within the organization.

P3C2 stated that,

The relationship we developed with the client enabled us to venture into other areas within their organization that we were not initially involved in. The premise was to provide solutions based on what we observed. As a result, we were asked to help in other areas and expanded what we can do.

P4C3 emphasized the importance of innovation. P4C3 stated that, "innovation is based on the yearnings of the client and creative disruption, which is based on competitor

and industry actions. We try to identify disruptors early, find innovative solutions, and make the necessary changes to address the disruption.” Furthermore, businesses must renew and update their strategies and core competencies in response to radical changes, new competitors, new technologies, and diverse customer preferences and demands (Sriboonlue et al., 2016). Leaders use innovative solutions to increase revenues, client satisfaction, and a better strategic position (Sriboonlue et al., 2016). Windahl (2015) found that the trend for firms shifted from service provider to solutions provider in an effort to address innovation. In addition, innovation affects the client’s activities and competencies, which require service providers to offer innovative solutions (Windahl, 2015).

Remaining relevant in relationships. All of the participants emphasized the importance of staying relevant in BPO relationships. P1C1 expressed that because of the fierce competition, organizations must remain relevant to their clients. P1C1 stated,

It’s unlikely that you will be doing something that your competition isn’t doing. You have to identify what differentiates your company from the competition. It all comes down to the relationship you build as well as the quality of service you provide.

P2C2 indicated that the firm must ensure it is relevant to the client. P2C2 stated that, “. . . your business must evolve or else it dies. Today it’s called innovation and disruption which brings about innovation resulting in evolution. Changing times, work ethics, technology, and other factors require innovation and evolution to stay relevant.” P3C2 stated that P2C2 does an excellent job representing the brand both in and out of the

organization. P3C2 stated that, “building the brand is only part of staying relevant. It takes the entire team to execute the strategies to remain relevant to our clients.” A review of the Requests for Proposals indicated that C2 had opportunities to bid on large contracts. Work orders provided documentation that C2 does a significant amount of business with their clients.

P4C3 identified the following two strategies for C3 to maintain relevant to its clients: (1) satisfying the client, and (2) getting regular feedback from clients. Industry summits with clients provide updates and reports about the quality of service provided by C3. P4C3 stated that, “we must make sure the customer is satisfied. There are metrics in place to assess how we are doing and what we need to improve upon from the client’s perspective.” One of the company documents and records reviewed included Customer Satisfaction Surveys that indicate the level of satisfaction with the service that C3 provides. In addition, the review of the BPO client quarterly evaluations of C3 provided feedback regarding the adherence to industry metrics and contract terms. Contracts provide platforms for learning processes to organize interactions that result in joint value creation (Gorovaia & Windsperger, 2018). Zhang et al. (2017) identified factors, such as trust, communication, and healthy regular relationship channels that influence outsourcing performance. In addition, BPO partners attain valuable resource exchanges with a good relationship that results in higher quality of performance in outsourcing activities (Zhang et al., 2017).

Correlation to the literature. The findings reported in Theme 2 align with Maciejczyk’s (2016) conclusion that BPO relationships require mechanisms of control

because of the impact on planning, operations, measurement, feedback, evaluation, and reward. Hansen and Rasmussen (2013) indicated that power and interdependency change over time, which requires changes in strategy for the relationship to remain aligned and appropriate. Relational uncertainty indirectly impacts cooperation and coordination in BPO relationships (Barua & Mani, 2014; Yap et al., 2016). In addition, knowledge of organizational practices and relationships encouraged trust and interaction, which results in mutually beneficial strategic partnerships (Hansen & Rasmussen, 2013; Richards (2017). Mani and Barua (2015) indicated that partnership quality determines the level of transfer of tacit knowledge between firms based on the extent of shared vision, goals, and the mutual belief of no opportunistic activity. Furthermore, the alignment of heterogeneity performance to incentives and actions generates cooperative behavior in ongoing BPO relationships (Mani & Barua, 2015).

Correlation to the conceptual framework. Theme 3 relates to Penrose's (1959) and Wernerfelt's (1984) RBV framework by considering relationships as resources. Obeng et al. (2014) identified relationships as intangible resources. El Shafeey and Trott (2014) found that businesses use resources such as relationships and brand names to gain and sustain CA. From a marketing perspective, evaluating RBV market-based resources, such as relationships and brand building, refers to a firm's assets and capabilities (Kozlenkova et al., 2014). Popli et al. (2017) proposed that affiliated firms leverage their advantages to attain superior long-term performance, as opposed to stand alone firms.

Applications to Professional Practice

The applications of this study to professional practice include providing small business leaders with strategies to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. Formulating and understanding effective strategies to enter the BPO market and increase revenue is critical to business success. The elements of the effective strategies found in this study enable small business leaders to identify and use resources to increase revenue, reduce the likelihood of bankruptcy, and grow the business. Small business leaders using professional resources and personal skills have an advantage when starting and managing a business. Entrepreneurs with prior knowledge and experience recognize business opportunities not obvious to everyone, despite their objective existence (Shu et al., 2018). Small business leaders' business and government relationships proved conducive to firm profitability (Shu et al., 2018).

Entering into long-term trade contracts reduced risks (Teixira, 2014; Zhang et al., 2017) and the potential for opportunistic behavior (Zhang et al., 2017). The participants in this study indicated that entering into long-term contracts with BPO clients enabled them to plan and grow their businesses. Furthermore, all participants stated that the position in the contract determines the level of control over the contract. Subcontractor or tier 2 positions provide entry into the BPO market but limit or eliminate control over the contract. Resources and skills needed for the success of some business entities are situated outside the firm and beyond direct control of its management (Eggert et al., 2017; Walczyk, 2016). Positioning the company to become prime or tier 1 contractors

enables small business leaders to control the contract and provide business opportunities to other firms. BPO projects are referred to as projects where service providers accept, manage, and control business processes (Zhang et al., 2018).

Understanding the benefits of establishing and building on relationships provides invaluable insight to industry changes, business opportunities, growth, and brand development. Building upon collaborative relationships through formal and informal meetings, events and activities help establish trust between the partners (Hou, Ho, Chung, & Wong, 2016). Providing innovative solutions to clients helps service providers remain relevant and provide long-term value to the client in BPO relationships (Eggert et al., 2017). Trust and information sharing are relational elements found in collaborative BPO relationships (McIvor, 2016).

Implications for Social Change

The implications for positive social change of this study are the potential increase in the success rate of small businesses, environmental improvements, sustainable behavior of residents, and revitalization of neighborhoods in which small businesses operate. The success of small business leaders enables them to make investments in improving and revitalizing the social and economic conditions of communities. The participants in this study indicated some implications for social change. P1C1 indicated that, “. . . exposing people to professional experiences and opportunities.” P2C2 stated that, “. . . creating something wonderful while helping people improve their lives and being of benefit and service to others” as an implication for social change. P4C3 replied that, “. . . being able to hire people enabling them to provide for their families, build self-

esteem, and improve their position in society makes our society better.” These are some of the non-monetary benefits identified by successful small business leaders. One of the participants in this study started a nonprofit training institution to empower youth, adults, veterans, and disabled persons with the skills they need to become economically self-sufficient. Successful small business leaders strengthen ties with communities and increase the probabilities of success (Alonso, Sakellarios, Alexander, & O’Brien, 2018; Gilinsky, Forbes, & Fuentes-Fernandez, 2018; Razalan, Bickle, Park, & Brosdahl, 2017; Rolleri et al., 2016). Small businesses are an essential part of the economy because they provide employment, improve employee performance, and increase employee spending (Alonso et al., 2018; Esmaeilpour & Barjoei, 2016; Gilinsky et al., 2018; Razalan et al., 2017). Successful small businesses provide jobs, sponsorships, donations to schools, shelters, food banks, scholarship funds, sports, and cultural arts programs (Alonso et al., 2018; Gilinsky et al., 2018; Mikolajek-Gocejna, 2016; Razalan et al., 2017).

Recommendations for Action

Small business leaders who enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy have entered into a growing market. Business leaders struggling to make a profit should consider entering the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. Small business leaders must develop strategies that include steps to: (a) evaluate and used professional resources and personal skills; (b) enter into long-term contracts with clients; and (c) establish and build on relationships with clients as part of their strategy to position the business for growth, profitability, and sustainability. Eggert et al. (2017)

identified positive indicators for entering the BPO market that includes a) cost advantages, b) better service quality, c) improved customer satisfaction, d) enhanced long-term value, and e) positive future cash flows. Potential negative signals from BPO include: a) loss of control over decision making, b) risk of interfirm conflict, and c) erosion of a firm's learning process (Eggert et al., 2017). In addition, Gorovaia and Windsperger (2018) indicated that contract duration provides a safeguarding function against uncertainty and from a RBV, a knowledge leveraging function for strategic value creation.

The results of this study will be disseminated via small business development organizations, networking events, business development training, and other vehicles that expose small business leaders and BPO clients to professional information and training. Academic institutions might include the information found in this study as part of the curriculum focused on entrepreneurship, strategies, and business development. Seminars and workshops, available through small business development agencies and organizations, about strategies to enter the BPO market to increase revenue might, provide valuable information to small business leaders. Exposure to this information might enable small business leaders, managers, academic professionals, and other individuals to understand the elements of successful strategies to enter the BPO market as service providers to increase revenue.

Recommendations for Further Research

The purpose of this qualitative multicase study was to explore strategies small

business leaders used to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. Although the results of this study expand the knowledge base of existing research on BPO service providers, future studies could be conducted addressing the delimitations of this study. Specifically, targeting small business BPO service providers outside of metropolitan Atlanta. In addition, further research could be conducted to identify additional strategies to enter the BPO market as service providers to increase revenue.

Recommendations for further research include addressing some of the limitations of this study, specifically the use of a small sample size of four small business leaders from three companies as study participants. This limitation prohibited the application of the findings across the BPO industry. In addition, the time limit for interviews was another limitation of the study. Future researchers might consider expanding the geographical area. Further research might be conducted using the quantitative and mixed-methods research methodologies to test hypotheses and examine the effect of using professional resources and personal skills, entering into trade contracts, and establishing and building on relationships with BPO clients on revenue.

Reflections

The journey through this Doctor of Business Administration (DBA) process at Walden University was very challenging but enlightening. Participating in discussions with people from around the world with various language and cultural challenges made me grateful for the opportunity to have this exposure. I experienced some health challenges along the way, specifically a diagnosis of breast cancer, six surgeries, and a

year of chemotherapy. Those challenges made me determined to push through the process to completion. My mentor, Dr. Gaytan, encouraged me every step of the way in a sympathetic but firm manner. Dr. Ghormley, also a breast cancer survivor, understood exactly what I was going through and was very encouraging as well.

I have been an entrepreneur for over 34 years and thought I might have some preconceived ideas and values while interacting with the participants of this study. Surprisingly, that was not the case. My level of thinking, academic writing, and appreciation for the use of formal strategies in business have improved tremendously. My expanded exposure to, and understanding of, the various components of business and level of academia throughout this process is priceless.

Conclusion

The purpose of this qualitative multicase study was to explore the strategies small business leaders use to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. The target population consisted of small business leaders located in the metropolitan Atlanta area with successful experience in the use of strategies to enter the BPO market as service providers to increase revenue and reduce the likelihood of bankruptcy. NVivo 11 Plus software was used for organization and analysis of the data collected. The following three themes emerged: (a) using professional resources and personal skills increased revenue, (b) entering into trade contracts with BPO clients increased revenue, and (c) establishing and building on relationships with BPO clients increased revenue.

The study findings added to the knowledge base and existing literature regarding strategies small business leaders use to enter the BPO market to increase revenue and reduce the likelihood of bankruptcy. In addition, the study correlated to the RBV conceptual framework. The applications to professional practice involved expanding the knowledge and understanding of small business leaders to identify crucial resources and elements that enable the formulation of successful strategies to enter the BPO market to increase revenue. The implications for positive social change of this study are the increase in the success rates of small businesses, improvement of the environment, sustainable behavior of residents, and revitalization of neighborhoods in which small businesses operate. Recommendations for small business leaders struggling to keep their business financially stable should consider entering the growing BPO market as service providers. Small business leaders must evaluate and used professional resources and personal skills; enter into long-term contracts with clients; and establish and build on relationships with clients to position the business for increase in revenue, growth, and success.

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Appendix A: Interview Protocol

Strategies for Small Business Leaders to Enter the

Business Process Outsourcing Market as Service Providers to Increase Revenue

The purpose of the study is to explore strategies used by small business leaders to enter the BPO market as service providers to increase revenue.

Interviewee: _____ Location: _____

Date: _____ Time: _____

Notes:

1. Greet interviewee and introduce myself.
2. Provide overview of the study and indicate the usefulness of the outcome.
3. Obtain signed consent form. Offer to answer any questions that interviewee may have.
4. Remind interviewee about their volunteer efforts to participate in the study.
5. Remind interviewee about recording the interview and start the recording.
6. Start the interview by recording interviewee's pre-assigned coded name, date, time and location.
7. Restate the overarching research question.
8. Start asking interview questions. Allow enough time to answer those questions.
9. Listen carefully to interviewee. Ask probing and follow-up questions, if needed.
10. At the end of the interview set up member check and company document review appointments and thank interviewee for their participation and time.
11. Provide participant your contact information if they have any questions.