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Organizational Strategies to Grow Mature Small Information Technology Businesses

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College of Management and Technology

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Timothy L. Knox

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Walden University
2019

Abstract

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by

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MSM, Strayer University, 2015

MSCJ, Troy University, 2006

BS, Excelsior College, 2001

Consulting Capstone Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

August 2019

Abstract

Standard indicators of slow growth among small businesses are negative job creation and lower tax revenue. Small business success and growth is necessary for increasing productivity, profitability, and job creation. The purpose of this single case study was to explore growth strategies leaders of a mature small information technology (IT) business in the midwestern United States used to grow their organization beyond existing capacity. Data were collected from semistructured interviews and review of organizational documentation. The conceptual framework for the study was general systems theory. The study included a purposeful sample of 2 senior leaders of a mature small IT business. Data gathered from interviews were manually coded and thematically organized. Through thematic analysis that included color coding themes from document review and interview responses, a storyline was developed showing 4 themes: Leadership development, standard operating procedures, succession planning, and long-term growth strategy. Identifying growth strategies may assist leaders of mature small IT businesses to grow beyond existing capacity. The findings of this study have implications for positive social change for leaders of mature small IT businesses and the local community because the information may help leaders of such businesses influence growth and expansion, decrease unemployment, and increase local tax revenue.

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Dedication

To my Mother and Father O.C. and Annie B. Knox, my wife, Marceea, you are the most supporting, loving, and beautiful person I know. To my children, Joshua and Meggan, and grandchildren Mikialah, Moses, Morgan, Kuylaya, Kamron, Jacob, and Jaklynn. I am grateful every day to have you in my life. To my mentor Rev. Roger Booker and his wife Vera Booker. To my in-laws, family, and friends. To my grandchildren and future generations, all things are possible if you want it bad enough and willing to work for it.

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I would like to start by thanking God the creator of life, my wife, Marceea, and children, Joshua and Meggan. Without your love, support, and encouragement, earning this degree would not have been possible. To my parents, I honor your memory by working hard and never giving up. To Dr. Peter Anthony and Dr. Jorge Gaytan, thank you for all of your help, encouragement, motivation, support, and patience during the completion of my study. In Memory of Dr. Robert Hockin, thank you supporting the Walden University DBA Consulting Capstone and taking a chance on having me participate. Thanks to Dr. Fred Walker and all the residency instructors for your hard work and dedication to my success. Jeremiah 29:11 for I know the thoughts that I think toward you, saith the Lord, thoughts of peace and not of evil, to give you an expected end.

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Section 1: Foundation of the Study

In this study, I used the 2017–2018 Baldrige Performance Excellence Framework to explore the strategies some information technology (IT) leaders use for growth beyond current capacity. In accordance with the guidelines for the Walden University consulting capstone, I served as both researcher and consultant to an assigned client organization.

Background of the Problem

Growth of mature small IT businesses is necessary for long-term productivity, profitability, and sustainability, but some mature small businesses do not grow as they age (York, 2017). Small firms make a significant contribution to the social and economic well-being of regions and countries by creating new jobs and increasing tax revenue (Deligianni, Voudouris, & Lioukas, 2015). There are at least 1.4 million mature small businesses operating in all industries in the United States (Stecker, 2014). When small businesses do not grow or go out of business, customers may get services at larger firms at higher prices. Another problem associated with the failure to grow is higher unemployment rates for local communities (York, 2017). Therefore, growth of mature small IT companies is important to the development and growth of the local community. In this study, I focused on strategies that a mature small IT business uses to grow and possible improvements so they can continue to grow. For instance, leaders operating mature small businesses might associate slow growth with poor marketing plans, informal control structures, and lack of vision from managers (Lu, 2015).

Problem Statement

Slow growth in mature small businesses often results in weak productivity, minimal profitability, and negative job creation (Kachlami & Yazdanfar, 2016). In 2015, U.S. small businesses had 58.9 million employees, which resulted in $1.9 million net jobs and $1.3 trillion in total exports (U.S. Small Business Administration [SBA], 2017). The general business problem is the leaders of some mature small businesses fail to grow the businesses beyond their current capacity. The specific business problem is the leaders of some mature small IT businesses lack growth strategies beyond their current capacity.

Purpose Statement

The purpose of this qualitative single case study was to explore the growth strategies that the leaders of some mature small IT businesses use to grow their organizations beyond their current capacity. The population for this study comprised leaders of one mature small IT company in the midwestern United States in need of successful growth strategies to create long-term growth and sustainability. Participants included two senior leaders of a mature small IT business with fewer than five employees that has been operating more than 10 years. The contribution to social change may be a reduction in stagnation and failure rates of mature small businesses, which can increase in job opportunities for growing local tax revenues and increasing local employment rates.

Nature of the Study

The research method chosen for this study is a qualitative single case study to explore growth strategies for mature small IT companies beyond their current capacity. Investigators conduct qualitative research to focus on the context of an organization and

business problem (Saunders, Lewis, & Thornhill, 2015). The qualitative research method is also typically more flexible and allows greater adaptation of the interaction between the researcher and the participants (Antwi & Hamza, 2015). The quantitative research method is appropriate when examining the relationship among variables by measuring and analyzing numerical data through statistical techniques (Park & Park, 2016). Researchers using the quantitative research method acquire generalized knowledge and make statistical inferences to a broad population (Saunders et al., 2015). Mixed method research includes a combination of quantitative and qualitative research techniques to address more complicated research questions and to develop a theoretical understanding (Saunders et al., 2015). Because I did not examine statistical inferences, neither quantitative nor mixed method research fit the purpose of the study.

Researchers conduct case studies to explore the *what*, *how*, and *why* and to obtain details and perspectives on a specific situation (Yin, 2018). Using a single case study design supported a process of collecting and analyzing data regarding strategies for long-term growth and expansion. In contrast, researchers use the phenomenological design to describe phenomena through the perceptions and lived experience of individuals (Levy, 2015), which was not appropriate for this study's purpose. Further, researchers use the ethnographic design to explore group cultures in a real-life setting (Saunders et al., 2015); however, because I did not study a business culture, the ethnographic design did not fit the purpose of my study. Finally, I did not choose a narrative design because researchers use a narrative design to obtain and explore the life stories and experiences narrated

chronologically by individuals (Yin, 2018), and I did not explore participants' life stories. The case study design was appropriate to address the purpose of this study.

Research Question

What organizational growth strategies do some leaders of mature small IT businesses use to grow beyond their current capacities?

Interview Questions

1. What indicators do you use to determine growth in your business?

2. What growth strategies have you used in the past?

3. How did you identify growth opportunities?

4. What performance goals did you develop to grow your mature small IT business?

5. What were the key barriers to implementing successful strategies in your mature small IT business so that it could grow beyond current capacity?

6. How did you address the key barriers to implementing the successful growth strategies for your business?

7. What additional information would you like to offer about the successful growth strategies that you have employed to grow your mature small IT business?

Conceptual Framework

The conceptual framework for this qualitative single case study was the general systems theory (GST) because IT business leadership requires various skills and processes to implement long-term growth strategies. Von Bertalanffy introduced the GST

in the late 1920s by building on previous work in the field of biology (von Bertalanffy, 1950). Leaders of mature small businesses assessing the uniqueness of their organizations can use the GST to address stagnation. The GST is appropriate when mature small businesses fail to grow beyond their current capacity. Thus, GST was useful for understanding the findings from my study.

Operational Definitions

Baldrige Performance Excellence Framework: The Baldrige Performance Excellence Framework is a holistic management and leadership tool used by senior leaders to address dynamic environments; to focus on strategy-driven performance; to achieve customer and workforce engagement; and to improve governance and ethics, societal responsibility, competitiveness, and long-term organizational sustainability (Baldrige Excellence Performance Framework, 2017).

Growth strategy: A growth strategy is a purposeful act by the managers of an organization to influence increased performance, production, and knowledge acquisition (York, 2017).

Mature small business: A mature small business is 5 or more years old and employs fewer than 500 employees on average in a 12-month period (Peric & Vitec, 2016).

Assumptions, Limitations, and Delimitations

Assumptions, limitations, and delimitations are out of the control of the researcher and influence the research performed (Guetterman & Fetters, 2018). Researchers must consider assumptions and limitations prior to conducting a study. The research design

must be logical and able to stand up to scrutiny (Saunders et al., 2015). The following are

assumptions, limitations, and delimitations for this qualitative single case study.

Assumptions

An assumption refers to a concept that an individual might assume but cannot

verify is true (Marshall & Rossman, 2016). This study included four assumptions. First, I

assumed the owner of the mature small business would answer the questions truthfully.

Second, I assumed a qualitative single case study design was appropriate. Third, I

assumed the results would allow me to provide an effective executive summary to the

client using the 2017–2018 Baldrige Performance Excellence Framework. Last, I

assumed that this study would benefit leaders of mature small businesses and affect social

change by increasing employment opportunities and increasing tax revenue in the local

community.

Limitations

Limitations are factors that might threaten the reliability and validity of a research

design (Saunders et al., 2015). Limitations are potential factors that researchers cannot

control (Marshall & Rossman, 2016). I assumed four limitations may influence this

study. First, using a single case study will decrease the transferability of the study

because of the small sample size. The second limitation narrowed the study to a single

mature small business participating as a client in the consulting capstone program. Third,

the sample size of two participants might have been too small to reach data saturation.

However, a large sample size does not guarantee data saturation, and a small sample size

does not mean that data saturation will not occur (Fusch & Ness, 2015). Lastly, working

within the constraints of the Walden consulting capstone and the Baldrige Performance Excellence Framework 2017–2018 limited the amount of time and access to participants.

Delimitations

Delimitations are factors that establish the scope of a case study (Lewis, 2015). The scope of this qualitative single case study is a mature small IT business in the midwestern United States. Delimitations for this study include the 2017–2018 Baldrige Performance Excellence Framework, research questions, conceptual framework, literature and academic reviews, and geographic region. Researchers must decide which delimitation to include and exclude within a study (Marshall & Rossman, 2016). The study included leaders of a mature small IT business participating in the Walden University consulting capstone program allowing the scholar-consultant to conduct an organizational evaluation using the 2017–2018 Baldrige Performance Excellence Framework. The boundaries of the study included mature small IT businesses that are more than 10 years old.

Significance of the Study

Contribution to Business Performance

This study may have financial and social implications for mature small IT businesses in the United States. Successful business leaders implement growth strategies that result in job creation, increased employment rates, community support, and increased tax revenue for the local economy (Lu, 2015). Leaders of mature small IT businesses might develop and implement growth strategies by focusing on the causes of business stagnation beyond 10 years of operations uncovered by the participants.

Implications for Social Change

Successful small businesses contribute both socially and financially to the U.S. economy. Small business owners employ 62% of the U.S. population and create approximately 99.7% of all firms with paid employees (SBA, 2018). Developing a successful business that sustains operations and grows beyond 10 years may influence communities' employment rates and tax revenues. Leaders of mature small businesses should understand strategies to influence growth and expansion so they can plan and increase the chances of continued growth and success.

A Review of the Professional and Academic Literature

In this qualitative single case study, I explored growth strategies that leaders of mature, small, family owned businesses use to expand beyond their current capacity. Through a review of the professional and academic literature, researchers can identify and summarize a specific research topic that helps to answer research questions (Guarnieri, Sobreiro, Nagano, & Serrano, 2015). The problem statement, purpose statement, central research question, and conceptual framework served as the foundation for this review of the professional and academic literature. The research question for this study was "What growth strategies do the leaders of some mature small businesses use to expand beyond their current capacity?"

Researchers preparing to conduct a literature review must use assorted sources, including web-based resources, books, and academic and professional journal articles (Guarnieri et al., 2015). The review of the literature includes articles from the following search terms: *mature small business, growth strategies, Small Business Administration,*

small business advocacy, economic value, start-up, product diversification, alliance, merger and acquisition, exporting, and *small business management skills*. General search terms related to the definitions and to understanding the significate of the study included *single case study, qualitative case study, systems theory, data saturation, reliability, transferability,* and *triangulation*.

I used the Walden University Library's database and the Google Scholar search engine to define and research pertinent articles for this review of the professional and academic literature. Databases used for this study included ABI/FORM, ProQuest, SAGE Journals, EBSCOhost, Emerald Management, and Business Source Complete. Other sources included research reports from the U.S. Census Bureau and the SBA. A requirement in Walden University's 2016 doctoral study rubric and research handbook is that 93% of all sources referenced must have a date of publication within 5 years of the expected completion of the study. I cited 165 sources in the literature review, and 134 (93% of the sources cited) are recent sources published between 2015 and 2019; of the peer-reviewed articles, 121 out of 153 were published within 5 years (93%), and 10 out of 12 books were published within 5 years (98%).

I explored growth strategies to understand the decisions leaders should make and implement to allow their company to expand beyond its current capacity. Ensuring the growth of small mature businesses involves identifying the growth strategies that fit an organization's current and future capacity, seeking internal and external growth opportunities, and supporting the growth of financial resources. The review of the literature is an organized discussion that includes the GST as the conceptual framework

to provide information for leaders of mature small IT businesses to observe, and if desired implement, growth and expansion strategies beyond the current capacity of their business. Business leaders can also benefit from GST by investigating dynamic interactions between operations and processes within a mature small IT business model.

General Systems Theory

The conceptual framework for this qualitative single case study is the GST. Researchers use GST to develop a holistic perspective of the internal and external environment of small businesses (Rousseau, 2015). Researchers apply the GST to help stakeholders and potential entrepreneurs in the business community gain insight into the processes, operations, and complexities involved in small business operations and growth strategies (Rousseau, 2015). For instance, the specific operations of mature small family-owned businesses include several processes and procedures operating simultaneously to produce a product or service (Amel & Mach, 2017). A focused examination on the interaction between all components of a process results in the complete exploration of the whole organization (von Bertalanffy, 1950). Researchers and organizational managers from various fields have benefited from using the GST. In the field of business management, leaders using GST can gain helpful insight into daily operations, budgeting, recruitment, and growth strategies (Kozan & Akdeniz, 2014). In addition, the management of these businesses benefit from the increased awareness of the various organizational divisions and how these components interact and affect other divisions within the organization (Montgomery & Oladapo, 2014).

The GST originated within the field of biology during the early 20th century with the intent to explore the entire workings of a system (Caws, 2015). Von Bertalanffy (1950) created the framework of the GST in the late 1920s. The term *systems theory* suggested that independent parts of a structure contributed positively or negatively to the entire system (von Bertalanffy, 1968). Throughout the 1920s and 1930s, systems theory influenced fields of study in biology and physics (von Bertalanffy, 1953). Then von Bertalanffy (1968, 1973) expanded the GST by examining linkages between science, personal relationships, business goals, and organizational challenges with a focus on internal and external drivers. For example, systems theory can be used to understand multidisciplinary systems such as individual fields of science that each function as a complex adaptive system (Adams, Hester, Bradley, Meyers, & Keating, 2014). Similarly, Chai and Yeo (2012) used the GST to examine the linkage between cause and effect on life, consciousness, and physics. Ceric (2015) also explored GST though the lens of all-inclusive systems in the science movement linking personal relationships and structures together. Additional advances for GST included refinement in both theory and science, linking cause and effect to internal and external environments (Montgomery & Oladapo, 2014).

Although initially proposed to combine science, GST crossed over into other fields of study such as business (Caws, 2015). Researchers apply the GST to business structures and situations to explore the operations, recruitment, and service culture in diverse business environments. For example, Pauliuk, Bettez, and Muller (2015) used the GST framework as socioeconomic case study on material flow analysis, life cycle

assessment, and supply and use tables. The general systems approach serves as a foundation for development of a formal and rational approach to management (Rousseau, 2015). Additionally, looking at systems in a holistic view highlights the strengths and weaknesses of the GST that are based on the short- and long-term goals of the businesses (Bridgen, 2017). For example, some business leaders face difficulties setting goals and strategies relating to the efforts of designing new products (Alblas, Peters, & Wortmann, 2014).

Although newer theories shorten the title to system theories, the focal point continues to revolve around the cause and effect surrounding a phenomenon that comprise the entire structure (Bridgen, 2017). A system is a series of objects that interlink cause and effect to the outcome of a specific goal or desire (Rousseau, 2015). In business, researchers using GST often take the view that an organization is a collection of interrelated and interacting parts (Ceric, 2015). For example, Hitt, Xu, and Carnes (2016) used GST to understand phenomena associated with operations management, which enhanced their ability to provide deeper insight about an organization's research questions.

The premise of GST is that agents can operate individually, which allows the group to organize independently and function as necessary to interact with other agents working within the group. Small business problems break down into many parts, but some business leaders lack the knowledge and experience to recognize the relationship between the parts. According to Bello and Ivanov (2014), the organization of some mature small businesses involve active relationships among different structures that

operate at various levels. This means that some mature small business leaders tolerate disorganization, avoid closure in the business environment, and primarily activate self-governance over multiple operations to maintain autonomy. Applying the GST to these issues has worked in industries like energy efficiency policies and health care organization (Chai & Yeo, 2012; Sturmberg, Martin, & Katerndahl, 2014).

The application of GST supports the exploration of strategies IT leaders use to manage the growth and sustainability of their organization (Fantazy et al., 2016). Using GST, Bode and Wagner (2015) suggested that the number of disruptions for local firms led to a higher volume of suppliers. Similarly, Fantazy, Tipu, and Kumar (2016) used the GST to conceptualize the attributes and benefits associated with effective communication strategies of supply chains and determine the impact on organizational performance. Thus, value created for business can result from the complex interactions between the organizational division and communication channels (Ceric, 2015).

GST can also be applied to help with professional development among employees. Puteh, Kaliannan, and Alam (2015) used the GST to explore how senior coworkers influence junior coworkers in both individual and professional development. Puteh et al. indicated that junior coworker benefit from the senior coworkers' experience, skills, and abilities and various other characteristics used in sustaining or achieving a competitive advantage. Sayin (2016) also posited that business leaders could adopt GST approaches to develop skills and competencies that result in improved performance through improved processes. Using systems theory thinking prevents leaders from relying on one management method; organizational leaders using systems theory thinking

develop management actions based on internal and external influences because organizational performance correlates to the interrelationships between the environment, management, and performance criteria variables (Sayin, 2016). Thus, small business leaders can incorporate different elements of the GST to make decisions, develop skills, and sustain profitability.

The theory of systems thinking has also been applied to other fields such as public health services. Leaders of public health agencies and their partners use systems thinking to improve health policy related to economics, research, quality improvements and mandates (Mays & Scutchfield, 2015). Healthcare leaders using systems thinking have demonstrated the benefits of systems thinking on both a local and national level. The Institute of Medicine, U.S. Preventative Services Task Force), and national health care organizations used systems thinking approaches to develop screening and counseling for intimate partner violence in the United States (Miller, McCaw, Humphreys, & Mitchell, 2015). Similarly, health care leaders are using systems theories to drives system change strategies related to workforce behavior and complex relationships techniques, particularly when focusing on cost reduction and efficiency (Oreskovic, Huang, & Moon, 2015). Health care managers use systems thinking to improve several different areas, including service delivery, workforce engagement, health IT, medical products, and financing and governance (Mutale, Balabanova, Chintu, Mwanamwenge, & Ayles, 2016). Additionally, health care leaders emphasize reducing health care costs, presenting challenges in the ability to fully understand the complexity of noncommunicable diseases (Mutale et al., 2016). By incorporating a systems approach, health care managers better

grasp the underlying causes of diseases, enhance personalized medicine, and are successful in developing actions that may prevent and treat chronic disease (Sturmberg et al., 2014). Additionally, systems theory has been used to show that patients preferred the decentralized units because of larger single occupancy rooms, greater privacy and confidentiality, and overall satisfaction with design (Real et al., 2018).

In addition to health care, systems theory has been applied to other fields such as psychology, law, media, and risk management. Trop, Burke, and Trop (2013) used systems theory in their psychotherapy study to identify and articulate interrelated components that positively or negatively impacted the effectiveness of health care interventions or programs. Further, Nobles and Schiff (2012) examined the relationship between state law and violence, the issue of translation between disparate legal orders, and how systems theory constructs the differences between modern and premodern societies in relations to legal pluralism. Using systems theory as a foundation, Nobles and Schiff posited that modern society consists of separate subsystems of communication such as the political system, economic system, legal system, and education system that are interrelated. Mangal (2013) also examined social media in the context of systems, as all online websites can be considered systems, and suggested that websites functionality and users' experience were impacted if self-organization, resilience, or hierarchy were affected. Finally, Skoko (2013) used the systems theory to evaluate and improve the assessment and management of environmental and health risk in the complex world of developing countries. Environmental and health risk were considered a complex adaptive system with interacting and interrelated factors (Skoko, 2013).

Some small business leaders lack understanding of systems thinking due to the absence of systems thinking education in schools (Gregory & Miller, 2014). Additionally, there have been limited programs designed to accommodate the needs of mature small business leaders (Sun, Hyland & Cui, 2014). However, mature small business owners familiar with systems thinking realize the importance and usefulness of systems thinking when applied to growth strategies (Sun et al., 2014). If business schools administrators integrated systems thinking throughout the course work, students might recognize the need and usefulness of systems and learn to design frameworks in addition to developing growth strategies (Gregory & Miller, 2014; Sun et al., 2014). The ability to transfer systems thinking knowledge and skills to target mature small business could change the way leaders create long-term growth strategies (Sun et al., 2014).

Systems design is participatory by nature, and social change occurs when stakeholders participate in the selection and implementation of the process (von Bertalanffy, 1968). Furthermore, systems design is structured for people to apply their skills to the analysis and design of socially and ecologically sustainable systems (Rousseau, 2015). The environment of every social system contains three levels of purpose: (a) the purpose of the systems; (b) the system of its parts and the system of which is a part; and (c) the suprasystem (von Bertalanffy, 1968). Leaders' actions in the context of systems approach have a clear conception of their mission as an integral part of the environment in which they work (Bode & Wagner, 2015). Von Bertalanffy (1950, 1953) often encouraged managers to become masters of their environment rather than victims.

Von Bertalanffy (1972) also emphasized expanding GST by examining goals and problems from a global perspective and a variety of lenses by focusing on emerging technology and disruptive innovation. Critical systems thinking is a recent trend in human-oriented systems that suggest managers combine knowledge-constitutive interest with interpretive analytical orientation to solve complex problems (Puteh et al., 2015). Systems thinking could result in fundamental change in leadership techniques including feedback, ownership, collaboration, competition, accountability, and clear direction on the influence of systems thinking (Miller et al., 2015).

Alternatives to GST. Three alternatives to GST include total quality management, pecking order theory, and self-determination theory. Although initially proposed for healthcare management, total quality management is applicable in numerous areas including business processes, managing quality, managing projects, and developing products and services (Irvine & Irvine, 2018). Total quality management's integrative approach to planning depends on collaboration and negotiation between operations, marketing, finance, and human resources to succeed (Harper, 2018). The integration of this model complements GST in ways business personnel solve problems. Furthermore, total quality management accounts for supply chain strategies, sales and operations planning, and forecasting, similar to rational approaches in the GST framework (Irvine & Irvine, 2018).

The pecking order theory was first introduced in 1961 and Stewart C. Myers and Nicolas Majluf modified it in 1984 (Myers & Majluf, 1984). Pecking order theory is designed for companies to prioritize their sources of financing according to asymmetry

information (Bhama, Jain, & Yadav, 2018). Asymmetric information influences the

choice small business leaders select when deciding between internal and external

financing and issue of debt or equity (Martinez, Scherger, & Guercio, 2019). Pecking

order theory postulates that the cost of financing increases with asymmetric information

(Myers & Majluf, 1984). Firm financing comes primarily from three sources: internal

funds, debt and new equity (Chen & Qi, 2016). Small business owners use internal funds

first, and when the internal funding runs low, seek external capital (Bates & Robb, 2016;

Sharma, 2017). Pecking order theory maintains that small businesses adhere to a

hierarchy of financing sources and prefer internal financing and debt to external equity

(Lee, Ying, & Chang, 2016). The form of debt a business chooses can act as a signal of

its need for external funding (Chen, 2015). According to Lee et al. (2016), companies

with low information symmetry have higher debt ratios than companies with high

information symmetry. Furthermore, small businesses with high information symmetry

can lower the cost of issuing stock and debt ration resulting in decreased risk of financial

crisis. Mature small business leaders know more about the financial health of their

companies than outside investors. Thus, the pecking order theory was a viable alternative

to GST, as it can serve as a guide for mature small business owners seeking long-term

growth strategies beyond their current capacity.

Finally, self-determination theory represents a framework that stipulates

individuals' desire for autonomy, competence, and relatedness for psychological growth

and well-being (Chiniara & Bentein, 2016). Mature small business owners who

understand the growth of small firms contribute significantly to the gross domestic

product (GDP). Leaders of mature small businesses can use the constructs of self-determination theory to assist with developing a long-term growth strategy and succession planning. The leaders of small companies that fail to develop growth strategies and succession planning have low productivity and profitability rates (Greenspan & Wooldridge 2018).

In self-determination theory, the need for autonomy relates to an individual's desire for freedom to make choices and self-determination (Chiniara & Bentein, 2016). Small business leaders pursue growth strategies to allow workers to experience ownership of task and autonomy of decision-making to increase productivity, enhance customer engagement, and challenge workers to improve professional skills (Morgan & Sisak, 2016). The need for competence refers to an individual's perceived feeling of effectiveness and confidence to reach desired goals (Chiniara & Bentein, 2016). Business leaders that implement structured training for staff members promote independent thinking and foster critical thinking skills to solve complex problems. Dragnic (2014) suggested that competence increased motivation, job satisfaction, and loyalty. The need for relatedness reflects the individual desire to have secure personal and professional relationships (Eggers, Lovelace, & Kraft, 2017). Job productivity increases when small business leaders create an environment for all members to learn and grow (Chiniara & Bentein, 2016). Business leaders increase workers' relatedness and improve chances for long-term growth when leaders maintain a good relationship with workers of the organization and include workers in the decision-making process (Zhang & Wei, 2015).

The managers' task in growth strategies involves accessing and combining resources such as identifying a location, human capital, hiring, recruiting, training, budgeting, marketing, securing funding, and succession planning (Gordon, 2018). Like any system, various interacting processes and factors influence the outcome of growth decisions. According to Deligianni et al., (2015) knowledge management is a critical factor in small business growth because it is difficult to plan, implement, and execute a strategy with limited knowledge in technology, markets, and international chain management. Mature small business owners have fewer financial options compared to larger firms to support long-term growth strategies, sometimes minimizing managers' confidence to take risks and pursue growth initiatives (Lee & Kim, 2016).

Although there are limitations on mature small business resources, an essential role of owners is to access and leverage available resources to develop and implement long-term growth strategies. According to von Bertalanffy (1972) leaders, seeking to influence an environment consisting of dynamic interaction between areas or processes can benefit from the perspective of a functioning system. Management might explore growth strategies with a holistic view of the small business environment from the perspective of the manager as the primary strategist. I explored growth strategies using GST to understand the process managers' encounter in their environment as functions within the entire system. Business leaders implementing GST can result in improving strategic growth management and organization adaptability to industry disruption and technological advances (Sayin, 2016).

As the primary strategist, the mature small business leader makes choices within the perimeters of their environment, funding, knowledge management, and growth strategy knowledge (Panda, 2015). The literature review begins with a chronological overview of the origin of small businesses and ends with the internal and external factors influencing mature small business growth.

The Origin of Small Business in the United States

Greenspan and Wooldridge (2018) reported that the history of supporting small business in the United States originated in Western Europe. 17th century European business ventures primarily existed along water routes between India and Europe (Groner, 2016). These companies were mostly large corporations supported by national governments and central banks (Groner, 2016; Means, 2001). Early industrialized nations such as the United Kingdom encouraged large private enterprise to secure significant investments and professional management (Draper, 2017). The leaders of Western European governments also supported the formation of large private businesses to create a competitive economy on a national, regional, and global scale (Backhouse, 2002).

Early European companies formed national and regional trading partners in Africa, Asia, and North and South America under the government-sponsored military, legal, and shipping rights (Groner, 2016). The history of small business started with the formation of proprietorships and partnerships between large British companies and small private companies contracting and supplementing services (Backhouse, 2002; Greenspan & Wooldridge, 2018). The creation of these partnerships was instrumental in establishing legal rights, policies, and protection for both parties (Greenspan & Wooldridge, 2018).

The formal recognition of individual company rights allows business leaders to enter into legal contracts, merge resources, and acquire needed funds to expand their businesses (Greenspan & Wooldridge, 2018).

By 1776, leaders in the United States had established the U.S. Constitution that contained rules, regulations, and policies that governed the transaction of business between corporations (Groner, 2016). As the genocide of Native Americans and enslavement of African people shifted the landscape of North America, the influx of new immigrants seeking new land ushered in a new era of business opportunity and growth (Isenberg, 2017). These new European immigrants were among the first small business entrepreneurs seeking prosperity in a land far from home (Greenspan & Wooldridge, 2018; Groner, 2016; Harris, 2013). Supported by British policies that encouraged and supported new ventures, new small business leaders applied for the same rights and protection as large corporations did. For example, British procedures such as the Incorporation and Regulations Act of 1844 and Companies Act of 1855 were sought out regularly by new immigrants to the United States (Groner, 2016; Means, 2001). Many small, private business owners registered their businesses to receive support and protection under the limited liability insurance provisions under British law (Greenspan & Wooldridge, 2018).

The early history of small business support in North America included government support, protection, and guidance from Western European countries (Groner, 2016; Means, 2001). A new era of small business support was evident in the mission, vision, and values of the SBA, created in 1953. Small businesses contribute to the

economic and social fabric of the community (SBA, 2017). The history of business

reflects the global connection of commerce on the social and economic well-being of

nations (Greenspan & Wooldridge, 2018). In the United States, support for small

business owners exists within the Small Business Act of 1953, which provides a

framework to ensure fair opportunities for government contracts and business loans (U.S.

SBA Assistance Act, 2017). The growth of small businesses in the United States is a

consequence of the support from local government policies and community banking

relationships. Community leaders might justify their continued support for small business

activity because of the social and economic contributions to communities.

Small Business

Small businesses usually operate with less than 500 active employees (SBA,

2018). In 2016, small businesses accounted for 56.8 million full- and part-time

employees and constituted 99.9% of all firms and 99.7% of all firms with paid employees

(SBA, 2017). A large number of small businesses operate in the United States, but the

figures do not fully illustrate the social and economic impact on communities and the

midwestern region. Small companies are firms organized for profit or not for profit and

classified by industry and mission (SBA, 2018).

Small businesses account for 62% of net new jobs in 19 industries classified by

the North American Classification System (SBA, 2017). These small business owners

operate as partnerships, S-corporations, or sole proprietorships, in compliance with

specific local, state, and federal tax guidelines (SBA, 2017). Small businesses contribute

to social and economic improvement within the community by providing employment

and tax revenue (Groner, 2016). A young person can volunteer to learn a specific skill or train with a small business mentor to gain business knowledge resulting in higher employment rates and increased revenue (Means, 2001). Leaders of the SBA encourage business ownership for minorities, women, and qualified military veteran (SBA, Office of Advocacy, 2017).

Since 2008 small business leaders have employed 55 million people in industries such as health care and social services assistance, food services, and retail businesses (SBA, 2017). American Indians and Alaska Natives, Asians, veterans, African Americans, and women small business owners hold approximately 26 million jobs in the United States (Lee, 2018; SBA, Office of Advocacy, 2017). Policymakers at the SBA classify businesses by professional, scientific, technology, legal or accounting services to distinguish the skills, scope, and mission of the businesses (SBA, 2017). Campbell and Park (2017) noted that small businesses account for a majority of all operations within the United States and the leaders of these firms control a sizable amount of capital in the form of human and physical resources. The diversity of small business sustains communities during times of economic and social downturns (Pallares & Adkisson, 2017).

Small business activity is an indicator of economic growth and productivity on a local, state, and national scale (Greenspan & Wooldridge, 2018). Small business growth influences GDP in the United States and contributes to the global economic mission (Groner, 2016). In 2015, small businesses accounted for 97.6% of firms that exported and 32.9% of the known export value (SBA, 2017). Small businesses contribute to the

economic and employment health of the U.S. economy. Small business success generates income for local owners, which drives social and economic prosperity to the surrounding community.

Family-Owned Small Business

A family-owned business is a business over which a family unit has control and is a sole proprietorship. The primary responsibility of operating, managing, and strategic planning falls on the family leaders of a family-owned business. Gielnik, Zacher, and Schmitt (2017) researched over 5,000 family-owned and non-family-owned small businesses and found that family-owned businesses relied on self-financing as the primary source of income during the start-up and sustainment phases of the business.

Although the leaders of family-owned businesses employ nonfamily members, employed family members receive preferential treatment in hiring and pay (O'Brien, Minjock, Colarelli, & Yang, 2018). The disparity in treatment and nepotism create a negative work environment and negatively affect productivity (O'Brien et al., 2018). Sinha, Pandey, and Varkkey (2017) also reported on the impact of nepotism and on hiring challenges faced by family-owned firms. Leaders practice of favoritism in the workplace creates adverse outcomes for recruiting and hiring employees (Gordon, 2018).

Family-owned businesses comprise the majority of small business with less than five employees (SBA, 2017). The tradition of hiring family members over more qualified candidates in family-owned businesses continues to hamper the growth, innovation, and creativity of small family-owned businesses (Sinha, Pandey, & Varkkey, 2017). Furthermore, Isenberg (2017) reported that when confronted with the hardship of hiring

unqualified applicants, family-owned leaders avoided the issue and placed blame on external factors. Small business leaders can gain valuable insight into growth strategies as their business moves through the stages of start-up, young, and maturity.

Startup, Young, and Mature Small Businesses

Small businesses are a primary source of economic growth, tax revenue, and job creation for local and regional communities. Although small business owners focus much of their attention on productivity and sustainability, small businesses affect the quality of life for many of the surrounding towns (Greenspan & Wooldridge, 2018). For example, the leaders of many small companies contribute funding for youth and sports activities and co-op training, and they encourage workers to participate in civil projects.

Policymakers use job ratings to measure the success or failure of small businesses, and these measures inform policies that affect small business growth and sustainability (Pallares & Adkisson, 2017). The value placed on small business is a direct reflection on economic growth and employment opportunity (Gielnik, Zacher, & Schmitt, 2017). Ninety-nine percent of all businesses fit into the small business category and provided 18.5 million jobs since 2008 (SBA, 2018). Small businesses are a vital component of the social and economic fabric of the community. Start-up businesses reflect the entrepreneur spirit of individuals seeking to fill a gap or create something new for the public.

Startup small businesses. Many start-up small businesses experience high growth in the initial phase, but half fail within the first year (SBA, 2017). Start-up businesses account for a substantial number of jobs and revenue, but they are prone to

failure when compared to young and mature businesses (Cosenz & Noto, 2016). Decker, Haltiwanger, Jarmin, and Miranda (2014) reported that most start-up business fail within the first five years of opening, which results in a 40% decline in small business jobs.

The SBA (2017) attributed the high failure rate of start-up businesses to poor strategies, such as move-up-and-move-out or get-rich-quick scams. Start-ups that survive the initial phase become growing businesses usually around the two-year mark. These businesses experience rapid growth and job creation, but still, struggle to mature past the five-year mark.

Young businesses. Business growth is at its highest level during the first 2 years (Bartz & Winkler, 2016). If a business survives the start-up phase, it grows at a faster pace than any other group of small businesses. Compared to mature firms, young businesses have higher growth rates in all industries (Bartz & Winkler, 2016). Young firms show substantially higher growth rates during economic prosperity, but the growth rates decline in times of financial crisis and disruption (Decker et al., 2014).

Young small businesses initially have high growth rates, but as the company ages, growth declines (Bartz & Winkler, 2016). The survival of young businesses past the start-up phase might not indicate a high degree of creativity and innovation. Therefore, young small businesses are similar to start-ups when compared to mature small businesses success rates, performance, and sustainability. The high failure rate of start-up and young small businesses is due to economic cycles and poor strategic planning.

Global and domestic economic downturns have a significant impact on small business survival (Amel & Mach, 2017). Small businesses are more fragile in times of

financial disruption, as they are more opaque and have less collateral (Kachlami & Yazdanfar, 2016). Economic instability creates hiring restraints in small businesses in comparison to larger firms, and although young businesses experience initial high growth rates, the business life cycle slows as they mature (Eggers, Lovelace, & Kraft, 2017).

Mature businesses. Mature small businesses that are more than five years old start to slow in the area of growth and expansion. In 2015, small businesses with less than 50 employees that were older than five years had negative job creation when compared to larger companies (SBA, 2017). The growth of mature small business declines after the first 5 years of operations and the reduction in growth continues as businesses reach their 10th year. The average 10-year-old small business grows 1.4% annually (Decker et al., 2014). Small business growth is higher in the start-up and young business cycle compared to those small businesses reaching maturity (Bartz & Winkler, 2016). However, when assessing businesses for growth potential, the growth of small businesses declines as the companies' age.

Bartz and Winkler (2016) concluded that small businesses have higher growth rates during the start-up and young business phase, but the comparison balances out as the company ages. Decker et al. (2014) and Hatiwanger et al. (2017) agreed that mature small businesses have lower employment rates due to slow growth and expansion. In addition to negative job creation and job losses, slow growth among mature small businesses influences the emergence of larger firms in a geographic area (Bartz & Winkler, 2016).

When exploring growth strategies for mature small businesses, it is essential to consider the age of the business and managers (Gielnik et al., 2017). The age of a business and its managers might influence the resources stakeholders are willing to invest, which may include funding for expansion, credit for supplies and equipment, and contracts for government jobs. The support from shareholders, the local community, and financial institutions depend on their perceptions of success and of the economic viability of the company.

Support from both stakeholders and shareholders positively relates to expansion and knowledge acquisition (Kozan & Akdeniz, 2014). Leaders of mature small IT businesses might understand the effect of growth and development on economic support as businesses age. The boundaries of this qualitative single case study will include businesses that are more than ten years old, but the inquiry will consist of strategies and changes that influence growth in a mature small IT business. The next section will include an exploration into growth strategies, growth opportunities, financing growth strategies, and the impact of managers' decision making on small mature businesses.

Small Business Growth Strategies

The chief aim of SBA leadership is to encourage the growth and development of small business entrepreneurs and guarantee commercial loans (Lee, 2018). Growth opens small businesses to new markets and sustains businesses during the business life cycle. One of the significant hurdles for small business growth is access to capital. Developing financial relationships with external stakeholders is critical to securing needed support to expand a business (Colucci & Visentin, 2017). Small business leaders pursue a growth

opportunity for both internal and external reasons (Wong, Holmes, & Schaper, 2018).

Growth allows the leaders of small businesses to seek additional markets and customers

to increase sales and expand products and services (SBA, 2017).

Internal justifications for growth and expansion include higher salaries for

employees, greater control of products and services, and personal achievement. Growth

strategies allow employees to develop processes and to explore innovative techniques and

challenge workers to improve professional skills (Bello & Ivanov, 2014). The leaders of

small businesses that fail to pursue growth strategies have low productivity and

profitability rates (Kozan & Akdeniz, 2014). Growth influences positive attitudes, job

satisfaction, trust, and long-term retention of employees (Colucci & Visentin, 2017).

Growth is the most critical aspect of productivity, profitability, and sustainability for

small business owners (Bello & Ivanov, 2014). These findings supported the claim by

Wong et al. (2018) that growth in small businesses represents an intricate pattern

involving the owners' ambitions, intentions, and competencies on the internal spectrum

and region-specific resources and infrastructure and external relationships on the visible

spectrum.

The primary responsibility of small business leaders is to create and implement a

long-term strategic growth plan. Small business leaders operating in fear and lacking

informed decision-making skills influence the advancement of long-term growth

strategies (Morgan & Sisak, 2016). Similarly, Dragnic (2014) suggested that small

business leaders should develop growth strategies that reflect their business

characteristics, financial and production capacity, and the ability to manage growth.

Small business leaders must consider many elements associated with increase to determine the best path for expansion.

Every business operates differently and faces unique financial, competition, and locations challenges (Reynos, Osuna, & Figueroa, 2014). The primary goal of small business leaders is to create a specific long-term growth strategy plan that will introduce their products or services to new customers and markets (Panda, 2015). However, the leaders of some small mature businesses are reluctant to release control by introducing new shareholders or partners to the firm (Keasey, Martinez, & Pindado, 2015). Mature small businesses need to grow, and data indicate growth is critical to sustainability, many small business leaders prefer the status quo (Reynos et al., 2014). The following sections include common growth strategies highlighted and encouraged by the SBA advocacy program.

Location expansion. Small business leaders often seek to relocate from their current operations to a more desirable destination to attract new customers (Lee, 2018). Before making the final decision to expand, small business leaders must assess many critical factors that drive business growth using location expansion. For example, financial development is a key indicator of readiness to expand. Economic development and business performance are the two most important indicators of growth and expansion (Gordon, 2018; Sharma & Bardhan, 2017). Another critical consideration is the desired area of the expansion. The decision regarding the selected location must be grounded in critical analysis for the suitability of the business and be part of the long-term growth strategy of the firm. Business owners must include factors such as distance, income

potential, population and size, and brand loyalty when considering location expansion as

a growth strategy plan (Wooten, 2018). Leaders must also consider the significant sales

decline in brick-and-mortar stores in comparisons to online shopping (Snipes & Pitts,

2015).

Careful consideration is necessary when considering physical location expansion.

Location and access are essential factors in the growth strategy, and Vanroose (2016)

recommend relocating to a high-density area to improve the chances of capturing new

customers and new markets. Small business leaders might consider their first entrance

strategy to involve moving to a location with unrelated businesses. Attracting new

customers by providing local services and products formerly not available might lead to

brand recognition and loyalty. Pinasti and Adawiyah (2016) noted a growing trend of

business collaboration in which former competitors work together to increase their

capability, create and capture value, and reap the benefits of leveraging resources. Small

business leaders might select locations based on historical sales data for the area, the

availability of potential employees, housing, school rankings, and safety of the customers

(Wooten, 2018). The availability of a highly qualified labor market is a crucial factor in

relocation strategies. For example, a location near a community college with a robust

technology program might benefit an IT company seeking new graduates with computer

programming skills. Small business leaders might create an intern or developmental

program that will allow local college students to receive hands-on experience and

mentorship from a certified computer specialist. The relationship between small business

leaders and community colleges might be mutually beneficial, as college leaders could

promote the intern program and the small business leaders could ensure a competent labor market for future growth and expansion.

In addition to factors such as population density and competent labor markets, giant corporations are more likely to relocate to areas with high quality-of-life features such as highly ranked primary and secondary schools and a skilled labor force (Groner, 2016). Furthermore, a diverse and growing community can be an attractive choice for leaders of corporations in search of small business product and service support. The industrial sector in which a business operates is a strong determinant of growth, and community support increases the firms' chances of sustainability and survivability (Peric & Vitec, 2016).

Relocating and expanding is a common desire for many small business leaders seeking long-term productivity of their mature small business (Jardon, 2018). Small business leaders must wisely consider all the factors of location when creating and implementing a long-term growth strategic plan. Small business leaders must curtail the excitement of relocating and carefully consider all aspects of relocating within the growth strategy plan.

Franchise sale. Small mature business owners looking to expand beyond their current capacity might consider franchising the business. Franchising is a widespread and multifaceted business arrangement that allows growth for small business enterprises (Wingrove & Urban, 2017). Mature small business leaders can reap the benefits of having multiple locations while continuing to improve the operations of the current site. Franchising generated $892 billion in sales in 2015 and contributed to 30% of all retail

sales in the United States (Kang, Asare, Alejandro, & Li, 2018). Another benefit is the reduction of operational responsibilities across several locations. Wingrove and Urban (2017) found that business owners selected franchising over independent ownership because of the low entry cost and the security of a proven business model. Franchising is an alternative to overcoming constraints to growth and is ideal for companies with limited financial resources (SBA, 2017).

There are benefits and challenges for businesses leaders seeking to grow by using franchising. Although franchising interest mature small business leaders, some fundamental gaps persist in training small business leaders to select the right growth strategy. Female business owners face inequality when attempting to franchise their businesses (Ellis & Fender, 2016). Leaders of the parent business offer mentorship and support to new owners, but new owners must continue to expand their leadership skills outside the parent franchise. A franchise contract should provide the franchisee with access to marketing, branding, and trademarks. In exchange for these established tools, the franchiser receives fees, commissions, and revenue for their services. Parent companies earn fees under contract with limited operational responsibility and reserve the right to expand a similar business within the jurisdiction of the franchisee (Jeon, Dant, & Baker, 2016). Not all franchises are the same; some challenges faced by small business owners seeking the franchise option include unfavorable practices such as early termination, inadequate training, and high fees associated with performance (Wingrove & Urban, 2016). Maintaining a positive and open relationship is critical to successful franchising. Although franchising is a viable alternative to overcoming growth

challenges, small business managers should seek professional advice before entering a franchise agreement or contract. An alternative to franchising is diversifying current products and introducing new products to the market.

Product diversification. Owners of mature small businesses have many options to implement a growth strategy involving product diversification. Product diversification means that firms have operations in more than one industry or product market (Can & Gozgor, 2018). Secondary stakeholders play a critical factor in the success of product diversification. According to Pallares and Adkisson (2017), secondary stakeholders are not primary to decision making but indirectly influence the organization.

Owners of mature small businesses can diversify products by introducing new services to the market or seeking new markets to invest. Another possible growth strategy using product diversification is offering complementary or related products to consumers. Early stages of product diversity often include a diminishing effect on performance and profit due to the high cost associated with diversification (Kim, Lee, & Cho, 2016). However, diversifying into a similar product line might decrease losses due to low product adaptation, knowledge-intensive requirements, and services in an unfamiliar industry or sector. Likewise, expanding to an unrelated product or service could involve complex decision making, costly exploration of products, and a high economic commitment in the early stages.

The significant challenges of product diversification in unfamiliar products and services include limited knowledge of competitors and confusion. Achieving and sustaining profitability based on product diversification is difficult to scale and costly

(Can & Gozgor, 2018). Managers must consider the cost of hiring employees to meet the demand of product diversification and growth (Pallares & Adkisson, 2017). Successful managers use product diversification as a growth strategy to explore industry competitors, prepare for an initial slowdown, and use effective cross-selling methods to expand the customer base. Management mistakes in product diversification strategies may lead to a decline in the growth rate of a fast-growing industry (Panda, 2018).

The decision to implement product diversification might delay immediate growth, but proper planning and implementation could produce long-term growth and expansion. As managers consider the best growth strategy for their organization, the quality of the product can influence brand loyalty and consumption. Consumer differences, coordination costs in supply chain management, and competitive pressures are underlying factors in determining performance (Oh, Sohl, & Rugman, 2015). Also, owners of mature small businesses should collaborate with the SBA to explore product diversification education, product placement and growth strategies. The owners of mature small companies have many options when pursuing product diversity. Whether they are diversifying to a related or unrelated product, service, or new market, long-term strategic planning is critical to the success of the product diversification implementation. Other strategies for owners of small businesses that are older than ten years include contracting with government agencies, merging or making alliances with firms, acquisition, or global expansion.

Government contracting. In an environment with complex and uncertain business practices, government contracting relationships force stakeholders to make a

commitment and maintain credibility in their relationship. Controlling costs and staying within a budget is an issue faced by most organizational leaders (Krotel, 2015). Owners of mature small businesses can pursue growth strategies by competing and bidding for government contracts. Government set-aside mandates that 23% of prime contracts go to small businesses; 5% of prime and subcontracts go to small women-owned businesses; and 3% of prime and subcontracts reserved for service-disable-veteran owned small businesses (Blount & Hill, 2015). The purpose of setting aside contracts for small businesses is to support the small businesses that employ 99.7% of working Americans (SBA, 2017). Although small and minority-owned businesses contribute to both local and regional economic profitability, they do not receive equitable opportunities in government contracting and subcontracting bids. Kim (2017) reported that small contractors are frozen out, not because of their ability but because the bidding process favors large corporations.

Underrepresentation of small and minority businesses in government contracting, purchasing, and subcontracting could indicate red flags for both parties. Many small and minority business owners perceive bias and favoritism toward large business firms, despite the quality of previous work or lack of experience in the area of expertise (Greenspan & Wooldrige, 2018). The bidding system appears corrupt, as large companies receive contracts and provide lower quality service to municipalities and communities (Cheng, 2015). Other challenges include fraud, pay to play, high cost, red tape, favoritism, and gender and racial bias in awarding contracts (Gordon, 2018). Many mature small business managers lack the experience and skill need to prepare and

compete for government contract and subcontract bids. A lack of information and administrative skills continue to challenge the owners of mature and minority-owned small businesses. Leaders of mature small businesses should work with the SBA advocacy program to receive training and education on securing contracts. Despite the challenges, government contracting, and subcontracting is a viable growth strategy for owners of mature small businesses.

The SBA provides guidance and training on becoming a government contractor and on how to secure contracting and subcontracting bids (SBA, 2017). Small business owners awarded a contract or subcontract is responsible for controlling the quality of the products and services delivered to the government. Government inspectors may inspect and test the products to determine if they meet contract requirements and specifications (Blount & Hill, 2015). The contracting officer for the government may change the specification and terms of the contract at any point during the process; therefore, leaders of mature small businesses should seek guidance during the entire delivery process (Cheng, 2015). Education, training, and mentorship are critical for owners of mature small businesses to establish and implement long-term growth strategies with government contracts, alliances, mergers, or acquisitions.

Alliances, mergers, and acquisitions. Owners of mature small businesses seeking to grow their business might consider combining efforts to exploit resources and share risk. However, collaborative partnerships tend to have an association with high failure rates. The goal of collaboration is to form cooperation across products and services (Liu, Sarala, Xing, & Cooper, 2017). Strategic alliances are a standard method of

collaboration that creates value for the firms involved (Qi, Sutton, & Zheng, 2015).

Mature small business managers must adapt to the new business environment by gaining

a holistic view of an alliance, merger, or acquisition. Although advantages to partnerships

exist, a partnership between unrelated and different size organization poses significant

challenges (Thomas & Kummer, 2015).

Small business owners initially seek to exploit the financial resources of the larger

firms to create value by reducing costs and liability (Gao & Mohamed, 2018; Qi et al.,

2015). A partnership between mature small businesses and large firms is riskier for the

smaller companies. The purpose of a merger is to generate synergies through lower costs

(Thomas & Kummer, 2015). However, the risk for smaller companies is the larger

partner controls production rights and daily operations. Resource interdependency alone

is not sufficient to ensure the successful continuation of a merger (Ratajczak, 2015).

Small business owners must consider the financial and social impact on their organization

when licensing new products. Liu et al. (2017) discussed the human side of collaborative

partnerships. Small businesses that merge with larger businesses face the challenge of

losing their identity as a brand and company.

In the early stage, small business owners should expect higher performance

results from a merger than larger business partners should expect (Arvanitis & Stucki,

2015; Qi et al., 2015). For cash-strapped small business owners, combining resources,

skills, and production costs is an effective growth strategy plan. Although alliances and

mergers provide an opportunity to expand products and services, the downside for small

business owners is the imbalance of power. Therefore, owners of mature small businesses

might seek to exploit new markets by deploying acquisition strategies. When the precautionary demand for cash is active, using acquisition strategies relates to better investment opportunities, more significant deal synergies, and better performance for the acquirer (Gao & Mohamed, 2018). Small business owners operating in the information and technology sector might leverage a technological innovation advantage to secure another company via an acquisition. Acquisitions in high-technology industries show that both product and technology relatedness have an inverted U-shape effect on the post-acquisition technological innovation performance of the acquirer (Lee & Kim, 2016). Small business owners have many options to expand their business beyond ten years; another viable option is global expansion into new and existing markets.

Global expansion. Small business leaders seeking to expand their current markets may look for opportunities beyond the domestic market. The number of international small businesses is increasing (Gollnhofer & Turkina, 2015). Approximately 96% of new customers live outside the continental United States, and two- thirds of the world's purchasing power are in foreign countries, which results in vast opportunities for the growth and expansion of mature small businesses (SBA, 2017). To conquer global markets, small business leaders should choose an entry mode, such as Greenfield investments, acquisitions, joint ventures, or looser forms such as international franchising and licensing (Wingrove & Urban, 2017).

As many as 33.4% of global Fortune 500 firms operate regionally, and 11.5% operate globally (Asmussen, Nielsen, Osegowitsch, & Sammartino, 2015). To participate in lucrative opportunities available abroad, small business owners must navigate the

complex proposition of an international business. Anwar (2016) reported on the diverse and highly competitive international markets and provided instructions on how to navigate complex global strategic challenges. Small business leaders seeking foreign opportunities must master special skills such as proprietary assets, brand equity issues, and well-managed market segments. Exporting products to increase profits, reduce market dependence, and stabilize seasonal sales is the primary method small business owners use to grow and expand their company. Small business leaders seeking to improve their companies may consider lucrative opportunities and create global expansion strategies for long-term growth.

Small business leaders seeking to expand globally might first find a location in which to export and distribute their goods. The U.S. company will team with a foreign distributor to sell products in the host nation's market, and the distributor acts as a representative of the international company and works with the local business community to sell the products. Foreign distributors can play a significant role in sales, as distributors interact with local business officials, legal authorities, and civic or social groups to support the products (SBA, 2017). Small business leaders must consider many factors when deciding to expand globally; for example, leaders must understand the culture, laws, social makeup, and purchasing power of the consumers and the values and beliefs of the host country. Insufficient cultural knowledge and poor product fit with a host country impede economic success, even with a well-established business plan (Gollnhofer & Turkina, 2015).

Small business owners are more likely to adopt the exploratory strategies of large businesses but must consider their limited resources. Firm-specific resources, such as assets and capabilities are critical when selecting a new market-entry strategy (Gollnhofer & Turkina, 2015). The strategy small business leaders select must align with the host country values and customers' purchasing power and laws. Brand extension and exporting success depends on the level of fit between the associations that host consumers and the parent brand (Lane & Fastoso, 2016). For example, many foreign customers associate Coke products with the United States. The magnitude of regional expansion depends on a firm's current level of local penetration (Asmussen et al., 2015).

Small business leaders must consider the similarity of the host country to their country of origin. When small business leaders select a host country with similar values and buying power, they are using an exploitation strategy. Exporting into areas closely related to existing areas of operation can quickly occur through the simple replication or incremental extension of current products and services (Asmussen et al., 2015). Therefore, moving into more distant markets increases the required supply of managerial resources and limits the useful services from existing resources.

Finally, growth in the volume of world trade has been unusually slow since 2010, and during 2015 was about 25% below the 2007 economic collapse, yet the growth in global exports continued to expand (The Oxford Economic, 2016). Global exporting is a viable strategy for small business leaders seeking to increase profits, reduce market dependence, stabilize seasonal sales, and expand their products and services. Many small business leaders do not realize that foreign sales opportunities are well within reach

(SBA, 2017). Programs such as the State Trade Expansion Program and Export Express Loan provide capital to small business leaders seeking to capitalize on lucrative international markets. Small business leaders must develop internet technology skills and the insight to implement global exporting strategies to capitalize on international growth opportunities.

Internet and social media. The Internet and social media offer small business owners many benefits and opportunities to attract new customers and to cultivate relationships with existing ones. Small business owners may use technology to accelerate innovation, improve brand loyalty, and increase revenues. Market size on the Internet is likely to grow to $6.7 trillion by 2020 (Shaltoni, 2017). Therefore, the Internet continues to offer endless marketing opportunities. The advancement in sales growth on the Internet and social media allows small business owners to enhance networking, business-to-business transactions, and online customer marketing.

Technological innovation and social media are vehicles for purposeful inflows and outflows of knowledge to accelerate communication internally while expanding markets for innovation (Feola, Parente, & Rassega, 2017). Social media is an effective form of marketing products both nationally and internationally, and using social media is an inexpensive and sometimes free platform easily integrated into current marketing strategies (Deligianni et al., 2015). Fifty-four percent of the U.S. population regularly uses social networking, and predictions indicated a global audience of 2.55 billion by 2017 (SBA, n.d.).

The main benefit of using the Internet and social media as a growth strategy and trade facilitator is reduced cost (Lendel & Vezina, 2015). A business website is the backbone of a marketing and growth strategy, and managers must cross-reference social media avenues with business cards and other social media platforms (Doherty, Ramsey, Harrigan, & Ibbotson, 2016).). Small business owners should stay abreast of the presence and reputation of the online marketplace, monitor feedback, and take action to improve products or services when warranted. The Internet and social media provide forums for small business owners to communicate with other businesses, and social networking is a similar platform for business owners to connect with customers (Eggers et al., 2017). Advertising spending on Facebook and MySpace was expected to reach $100 trillion in 2020 (Michaelidow, Siamagka, & Christodoulides, 2011). Internet and social media technology enable business leaders to experience rapid economic growth; increased employment, efficiency, and effectiveness; and improved market reach (Doherty et al., 2016; Michaelidou et al., 2011).

Despite the benefits of websites, which include enhanced levels of productivity, improved efficiency, access to extensive market information and business knowledge, 57% of small organizations with less than ten employees did not have websites in 2015 compared to 35% of medium and 3% of large organizations (Shaltoni, 2017). Many small business owners have been slow to adopt new technologies due to perceived barriers such as lack of money, time, and training; negative reviews; and unfamiliarity with technology. Small business owners tend to prefer social media over having a dedicated website for their business (Shaltoni, 2017). However, some small business owners do not

stay abreast of their social network presence or act to develop positive relationships with customers. Firm size can affect adoption decisions, and smaller firms are more innovative and receptive to new technologies (Michaelidou et al., 2011). Lendle and Vezina (2015) compared offline U.S. exporters to eBay exporters, and offline exporters exceeded $2 million in sales compared to $5,000 for eBay exporters.

Small business owners are the primary decision-makers when it comes to technology innovation and social media for businesses. The Internet provides web analytics that includes concrete measurements of business performance and demographic details such as gender, age range, and geographic locations. Small business owners seeking to grow their business should consider the advantages of the Internet and social media. Although many small business owners depend on existing business metrics designed for a world of concrete boundaries and fixed demographics, this business reality is slowly slipping away. Internet and social media positively influence small business growth and expansion (Lendle & Vezina, 2015; Michaelidou et al., 2011; Shaltoni, 2017). Mature small business owners must consider the opportunities and take advantage of the Internet and social media technologies for growth and expansion beyond current capacity. One of the primary goals of the SBA is to assist small business growth; however, it is incumbent upon small business owners to embrace change and explore the new opportunities created by innovative technology and social media. Exploring the decision-making process and use of growth strategies of small business managers is critical to domestic and international growth. Policymakers, shareholders, and stakeholders of small businesses must work together to ensure survival and grow for the

sake of the entire community. The primary way these stakeholders can assist with small business growth is to provide financial rewards and support.

Funding Growth Options

Small businesses with fewer than 500 employees represent 99.7% of all employer firms, which account for 50% of U.S. GDP and 50% of net jobs in the private sector. Access to bank loans is essential to small business owners because financial institutions provide more debt capital to small businesses than all other sources combined (Chen & Qi, 2016). The success of small businesses depends critically on owners' access to financial capital, and firms using business debt financing are more likely to survive and grow (Kapinos, Calvez, & Kapinos, 2016). Banks and lending institutions account for more than 90% of debt financing among small businesses (Gill, Maung, & Chowdhury, 2016). The majority of small businesses face financial constraints, and most funding comes from family wealth and loans from financial institutions. Access to capital and debt financing is the most challenging factor that affects small business expansion, growth, and prosperity. Approximately 50% of small business financing comes in the form of debt, loans, and credit borrowing (Dai, Ivanov, & Cole, 2017). Small business total assets to liability were between 47% and 48% between 1993 and 2003 (SBA, 2017). Smaller businesses concentrate their external borrowing on commercial banks and primarily use owner-backed loans, personal or family backing and business credit lines to grow or sustain the business (Dia et al., 2017; Maung & Chowdhury, 2015). Financially constrained small businesses benefit the most from increased access to bank financing, and greater access to financing leads to higher firm productivity (Krishnan, Nandy, &

Puri, 2015). Inadequate financial resources often emerge as the primary challenge to growth and innovation for small businesses (Cheng, 2015). Firms with increased access to funding sources continue to expand, expect future sales growth, and maintain a competitive advantage in the marketplace (SBA, 2018).

Some small business owners have limited access to capital when compared to larger firms. The financial challenges to small business owners often limit long-term growth and expansion for small businesses. Small businesses receive funding primarily by SBA-backed loans, including debt financing, surety bonds, and equity financing (Alon, Boulanger, Misati, & Madanoglu, 2015). Conventional commercial loan markets may not offer small business owners the capital needed for growth. However, when compared to larger firms, small businesses face a challenge in securing needed funding. For example, small businesses often lack the diversity of portfolios and collateral to absorb economic downturns or setbacks. Financial institutions and investors seek to minimize their risk by investing in companies with a diversified portfolio of projects (Scott, Scott, & Link, 2017). Leaders of small firms have difficulties applying most of the proposed solutions that are commonly used by leaders of larger firms (Gill, Maung & Chowdhury, 2015). Small firms also face challenges with access to commercial paper, bonds, and lines of credit when compared to larger firms. Firm size is a proxy for financial constraints, as smaller firms typically face more significant challenges in sourcing capital (Krishnan et al., 2015). Although small businesses comprise half of all private-sector jobs and contribute to half of the U.S. GDP, small business owners continue to struggle to gain access to lending and financing. Financing small businesses

would reduce small business failure by almost 60% (Cheng, 2015). The economic and social impact of small business is well documented; however, lending institutions and investors continue to view small businesses as risky investments. Small minority-owned businesses may experience additional burdens of securing small business loans. Black and other minority business owners seeking financial capital face denials more often than White owners, and when approved they are consistently offered less assistance, pay higher interest rates, and receive smaller loans compare to the owners of equally creditworthy white-owned firms (Bates & Robb, 2016; Sharma, 2017). Minority small business owners needing credit often report not applying because of a fear of rejection and intimidation.

The financial options for small business owners often include only personal and family financing, SBA-approved loans, grants, surety bonds, disaster assistance, and investment capital (Lee, Sameen, & Cowling, 2015). Access to adequate financing is an essential factor in alleviating growth constraints for small business owners seeking to expand. Small business owners are eligible to receive SBA support and services (Krishnan et al., 2015). For example, small business owners can seek loan amounts between $500 and $5.5 million. Capital constraints are among the most important reasons that small business owners seek additional equity (Chen & Qi, 2016).

Economic uncertainty can be extraordinarily challenging for owners of mature small businesses to achieve growth beyond their current capacity. Small business bankruptcies during the 2007–2009 economic recession rose over 100%, and third-quarter losses in 2009 accounted for 60% of net job losses in the United States (Scott &

Pressman, 2017). During economic downturns and crisis, small business owners seek to survive by using alternative financing options. Black and minority owners were 30 times more likely to see their business fail compared to White small business owners (Scott & Pressman, 2017; Sharma, 2017). Most small business owners using their home equity to maintain or grow their businesses during the great recession, as small business owners faced a $25 billion reduction in their access to credit (Lee et al., 2015).

Some mature small business owners seek alternative financing methods such as bootstrapping to secure needed funding. Bootstrapping includes cash advances from lenders, leaseback options, peer-to-peer lending, and crowdsourcing websites. Financing is an essential issue for firms of all sizes during times of financial uncertainty and given the important role that small business play in job creation, financial constraints for small businesses are an important policy concern worldwide. Leaders of small business investment companies invest in small businesses through debt, equity, or a combination of both (SBA, n.d.). Access to financial capital is critical for the sustainment and growth of small businesses during both challenging and favorable economic times. Therefore, banking institutions remain a vital part of the growth and expansion of mature small businesses (Lee et al., 2015).

The advocacy leaders of SBA work with lenders to provide loans to small business owners. The SBA does not lend money directly to small business owners. Instead, the SBA partners with banks, credit unions, micro-lending institutions, and private equity firms to reduce the risk for lenders and make it easier for small business owners to gain access to capital (SBA, 2017). Although small business owners have

limited asset bases and often cannot afford much collateral, they tend to borrow significant amounts of capital (Dai et al., 2017). Small business owners tend to concentrate their external borrowing from commercial banks, and most of the outside debt is in the form of bank loans and business lines of credit (Lee et al., 2015). However, black and minority small business owners find it challenging to qualify for bank loans, despite the same or higher creditworthiness when compared to white small business owners (Gordon, 2018). Black and Latino small business owners' loan applications experience a higher incidence of loan denials and these borrowers pay higher rates than Whites with the same creditworthiness and often report not applying for loans because of poor services, mistreatment, and fear of rejection (Bates & Robb, 2016; Lee et al., 2015). Banks mistreat Blacks and Latinos badly relative to equally creditworthy Whites (Bates & Robb, 2016; Sharma, 2017). Discriminatory lending practices against Black and Latino small business owners reduce employment rates and decrease tax revenue for their local community (Bates & Robb, 2016; Cheng, 2015). Small business owners' relationships with local bankers continue to shift away from personal relationships to business relationships.

After the 2007–2009 economic recession, small business owners continued to search for new and creative forms of financial support to sustain and grow their business. Another strategy for owners of mature small businesses to achieve economic growth is venture capital and crowdfunding. Small business owners might find investors willing to invest by accessing crowdfunding platforms, impressing angel investors, or attracting venture capitalists. According to Mihaela (2017) and Wie (2018), venture capital is an

crucial intermediary in financial markets for small business owners that might otherwise result in denial; likewise, crowdfunding is a new way to finance ventures by requesting money from a relatively large number of individuals using the Internet.

Many small business owners seek growth by capitalizing on their past success. Small business owners can use an initial public offering to secure growth funding and expansion strategies (Jeppsson, 2018). An initial public offering is a collaborative process that includes banks, attorneys, business leaders, and auditors working together to assess the viability of the business. Small businesses' issuing an initial public offering is a complex undertaking, and many small business owners do not seek this option due to the loss of autonomy.

Finally, small business owners might seek to fund their firm by franchising. Franchising serves as an opportunity for entrepreneurial venture creation and growth. Franchising is one of the most significant marketing innovations of the 20th century, with more than 900,000 franchised establishments generating over $880 billion in direct economic output and providing more than 11 million American jobs (Alon et al., 2015). The United States is the leader in the franchising industry based on general performance (Madanoglu, Alon, & Shoham, 2017).

The personal preference of small business managers is essential to the long-term growth strategy and success of a firm. Many small business leaders prefer not to grow beyond their current capacity. These small business leaders are often pessimistic about growth and enjoy the autonomy to stay close to home and set their hours. The next section includes the most critical factor in growth strategy management, which is the

attitude and entrepreneurial spirit of the business manager as the principal growth strategist.

Growth Strategy Management

Small firms contribute significantly to the GDP, and the growth of small firms associated with the strategic choices of leaders, owners, and managers. The ability of strategic managers to create, manage, and maintain growth strategies often determines small business growth (Deligianni et al., 2015). The primary goals of the firm's growth strategist are to improve productivity and profitability. An association often exists between small firms' growth and managerial networking intensity (Panda, 2015). Small business owners serve as the chief strategist for the organization but often have limited strategic experience beyond their technical skills and expertise. Knowledge accumulation is necessary to define the shape and trajectory of small business growth (Deligianni et al., 2015). The small business owner, as primary growth strategist faces many challenges that may hinder the growth of a firm. Successful growth strategists integrate distinctive management competencies that include financial decision-making skills and relevant knowledge to invigorate a firm's growth (Raza-Bilal, Naveed, & Anwer, 2015).

Small business owners must effectively manage their organizational growth through creative planning and flawless execution. In addition to being chief strategist, small business owners must master many duties and responsibilities in the daily operations of a business. The principal characteristics of successful growth strategists include professionalism, commitment, creativity, entrepreneurship, and the willingness to learn quickly, predict the future, take the risk, and bear the responsibility to lead (Wong,

Holmes & Schaper, 2018). Small business owners might recognize the need to grow and expand, but lack the time, energy, and knowledge to create and implement a growth plan. Many small business owners lack the confidence to manage growth or the willingness to change business traditions passed from previous generations. Small business managers often feel overwhelmed by a large number of tasks associated with maintaining current levels of operations and by increased levels of work related to growth and expansion. The mind-set of small business owners prevents them from trusting outsiders to help develop a growth strategy or partner in growth development (Zhang & Wei, 2015).

Small business managers seeking to grow their business must understand the importance of organization culture on growth strategies. Small business owners must emphasize on the relationship between organizational growth and maintain current levels of operations. Cultural mismatches and misunderstandings are the main reason for significant problems and low levels of strategic growth implementation. Therefore, small business owners must notice opportunities provided by external determinates and at the same time, internal opportunities generated within the organization (Wong, Holmes, & Schaper, 2018).

Small business owners must continue to improve their knowledge of growth creation and implementation. Knowledge management is a central force to small business growth. Specifically, technology, market, and general expertise are a significant influence on small business growth (Deligianni et al., 2015). Knowledge management is critical for growth because it is unlikely that a firm will sustain growth over time solely by increasing market share with existing products in existing markets. Growth and

productivity might result from learning about new opportunities, gaining support from other industry leaders, and building relationships with international partners. The lack of strategic management knowledge often creates pressure for managers feeling trapped or locked in an incremental innovation pattern where growth is dependent on outdated principles (Deligianni et al., 2015). Social networking is essential in exploring business growth. Social networking exposes small managers to new markets and products. Although small business owners often lack time to attend social events, the Internet provides alternative social networking opportunities. Entrepreneurial growth coincides with managerial networking, and managerial networking is fundamental to business growth (Panda, 2015). Small business owners must improve their technological, marketing, and general knowledge to create a culture of innovation and creativity for all stakeholders.

The attitude of small business owners determines the growth and expansion of the organization. Many small business owners, especially family-owned small business owners, are resistant to change because the owners may have used simple processes, practices, and strategies for decades. The family business management style can be a bottleneck during an expansion (Zhang & Wei, 2015). Fear of giving up anonymity can deter small business owners' decisions toward growth (Raza-Bilal et al., 2015; Panda, 2015; Zhang & Wei, 2015). Some small business owners view growth as infringing upon their family time, prefer to maintain the status quo, and consider growth as secondary to their happiness. Small business owners' attitude about growth is complex, and their

willingness to learn the necessary skills is time-consuming. Many small business owners feel helpless about growth due to the lack of knowledge and expertise.

Many small business owners create their business based on their professional skills and training to serve a niche population of customers. The vast majority of small business owners are nonemployee businesses, with the largest group of more than 3 million in professional and technical fields (SBA, n.d.). Small business owners, especially the owners of family-owned businesses, possess a skill within the context of their professional experience but fail to seek additional business management skills or hire professional managers (Zhang & Wei, 2015). Some small business owners realize they need to expand, but few find outside business management consulting to help them create and maintain a growth strategy. For example, the SBA has various training and consulting services available for small business owners seeking to grow their business. For mature small business owners seeking to grow their businesses, the SBA has financial support and leadership training. Many small business owners do not realize that a firm's age does not mean they have learned the necessary skills to grow their business. A firm can get older without increasing, and age itself does not directly imply the availability of more financial resources (Kachlami & Yazdanfar, 2016). Small business owners' commitment, motivation, attitude, and knowledge of creating, implementing, and maintaining a strategic growth plan has the most significant impact on firm growth. The interview questions (see Appendix A) include how small business owners defined growth and identified growth opportunities for their business.

Other Internal and External Growth Factors

Small business owners face many factors that influence growth beyond the current level of capacity. Issues that drive growth are internal to the business, such as the managers' age and ability to focus on growth opportunities. External drivers might include economic downturns.

Effects of small business managers' age and focus on growth opportunities. The individual characteristics of the owners, managers, and employees influence small business growth (Gielnik et al., 2017). As small business leaders mature in age, they experience changes in socioemotional and motivational characteristics, such as goal setting and motivation to change (Keasey et al., 2015). Older managers do not necessarily slow growth down by virtue of their age; however, specific capabilities and resources decline, such as information processing and physical and psychological stamina (Eggers et al., 2017). Such age-related factors are critical for managers to find and react to growth opportunities. The social norms in most Western societies indicate that older workers should aim for retirement and not pursue new professional opportunities when they reach a certain age (Kachlami & Yazdanfar, 2016). After the great recession of 2008, these social norms began to change, and people started working longer and seeking more opportunities in new business industries (Morgan & Sisak, 2016).

Focus on opportunity is a cognitive-motivational construct that describes how managers and leaders view future personal and professional goals (Morgan & Sisak, 2016). As older managers perceive that their time at work is running out, they are less likely to invest resources in future goals, such as knowledge acquisition (Kooji & Zacher,

2016). Focus on opportunity captures managers' beliefs about the future. Furthermore, older small business managers might also experience age-graded constraints in the form of credit rationing by banks and suppliers (Gielnik et al., 2017).

Economic downturn. In 2008, American businesses experienced one of the most challenging economic downturns since the great depression in 1930 (Peric & Vitec, 2016). Total outstanding loans to businesses by commercial banks dropped off substantially during the great recession of 2008 (Amel & Mach, 2017). During economic downturns, it is difficult for small business owners to secure commercial and conventional bank loans, and small firms' access to finance has direct links to capital structure (Cowling, Liu, Ledger, & Zhang, 2015).

The financial crisis faced by some small business owners after the 2008 downturn resulted in tax credit programs and incentives (SBA, 2017). Smaller banks react negatively during imposition and reduce lending to small businesses (Kiser, Prager, & Scott, 2016). Yazici (2016) noted that the primary role of the SBA is to finance small business ventures, however, instead of funding individuals, the SBA subsidizes only those receiving loans from commercial banks.

The SBA has valuable services available to start-up, young, and mature small business owners across the United States (Lee, 2018). The primary goal of the SBA is growth, development, education, resources, leadership, and financing small businesses (Lee et al., 2015; SBA, 2017). The SBA advocates for small business owners and encourages entrepreneurship for individuals seeking to start small businesses. The SBA does not lend money to individuals simply because they have a dream of ownership;

rather, the SBA guarantees loans to individuals with secured commercial loans from a bank, credit union, or a business-lending institution (Lee, 2018). The SBA operates across regions and provides economic development across all segments and industries.

Transition

The existing body of literature on growth strategies for mature small IT business varied. Academic scholars explored growth strategies for mature small IT business leaders but provided limited evidence on processes to grow the mature small business beyond current capacity. I sought to discover holistic views on growth strategies within the small business environment from the perspective of the leaders was the purpose of the study. My review and analysis of professional and academic literature included peer-reviewed journal articles, seminal works, and government report with the past five years.

In Section 2, I provided a comprehensive analysis of the research purpose, the role of the researcher, participants, research method and design, population and sampling, ethical principles of human research, data collection instruments, data analysis, data organization technique, and qualitative data analysis. I included in-depth information on reliability, dependability, credibility, confirmability, transferability, and validity. I discussed triangulation methods, data saturation, and data storage and destruction techniques.

In Section 3, I used the 2017–2018 Baldrige Performance Excellence Framework to conduct an in-depth review of ABC. I focused on several topics, including (a) organizational profile; (b) leadership; (c) customer relationships; (d) measurement, analysis, and knowledge management; (e) workforce; (f) operations; and (g) results of

process and products. I concluded Section 3 by providing an executive summary of key

findings, project summary, contributions, and recommendations.

Section 2: The Project

In this section, I will include a review of the study purpose, research method and design, role of the researcher, and data collection methods and techniques. I used semistructured telephone interviews and e-mail as my primary method to collect data from each participant. Furthermore, I will review organizational documents and company websites to review documents relative to how business leaders of a mature small IT company in the midwestern United States grew beyond current capacity. I will focus on several topics, including (a) organizational profile; (b) leadership; (c) customer relationships; (d) measurement, analysis, and knowledge management; (e) workforce; (f) operations; and (g) results of process and products.

Purpose Statement

The purpose of this qualitative single case study was to explore the growth strategies that the leaders of some mature small IT businesses use to grow their organizations beyond their current capacity. The population for this study comprised leaders of one mature small IT company in the midwestern United States in need of successful growth strategies to create long-term growth and sustainability. Participants included two senior leaders of a mature small IT business with fewer than five employees that has been operating more than 10 years. The contribution to social change may be a reduction in stagnation and failure rates of mature small businesses, which can increase in job opportunities for growing local tax revenues and increasing local employment rates.

Role of the Researcher

The researcher is often the primary source for data collection, which often involves conducting interviews in qualitative case studies (Saunders et al., 2015). For this qualitative single case study, I served as the primary instrument for data collection. I have no direct experience in consulting and researching organizational growth strategies for mature small IT businesses.

It is important to incorporate the *Belmont Report* into research studies for to ensure ethical behavior (Barton, Thominet, Boeder, & Primeau, 2018), so I used the *Belmont Report* as a guide to exhibit ethical behavior and determine my role and responsibility while collecting the informed consent forms and data. To ensure my actions aligned with the principles of Walden University's Institutional Review Board (IRB) requirements and U.S. federal regulations, I required each participant to read and sign a consent form and service order agreement outlining the voluntary participation in the case study. According to the *Belmont Report*, researchers follow three basic principles: respect for persons, beneficence, and justice (Adashi, Walters, & Menikoff, 2018). Respect of persons requires researchers to consider the needs of the applicant above the rewards of completing the study (Jordan & Gray, 2018). Researchers apply beneficence when they conduct a risk assessment to examine whether the proposed research is properly designed to minimize harm (Boddy, 2016). Similarly, researchers comply with the justice principle when they give rise to moral requirements to ensure the study is absent of economic, racial, and social discrimination (Miracle, 2016). I treated

each participant ethically and abided by the guidance outlined in the manual for the DBA Consulting Capstone.

Walden University administrators also require doctoral of business administration (DBA) consulting capstone students to obtain IRB approval prior to conducting research to protect the interest of human subjects (Walden University, 2017). After receiving IRB approval, I reviewed ABC's website to familiarize myself with the mission, vision, and staff of the company. In case study research, reviewing public documents allows researchers to gain a broader understanding of the organizational structure, processes, and procedures (Yin, 2018). Researchers aspire to gain trust of the interviewees and establish a comfortable environment that allows the participant to speak freely (Varpio & Meyer, 2017). Researchers also use an interview protocol to guide the interview process (Ross, Iguchi, & Panicker, 2018). I used an interview protocol (see Appendix B) to collect data, identify themes, and ensure clients understood their right to stop the interview process at any point of the interview session.

I also ensured integrity in terms of honesty, transparency, and objectivity by sticking to the research questions and avoiding bias in data interpretation (Shaw & Satalkar, 2018). Case study researchers are especially prone to biased behavior and should be sensitive to contrary evidence (Miracle, 2016). The first step in minimizing research bias is to admit that researchers have bias and implement measurements to control them (Ganapathy, 2016). Realizing the need to control my personal bias, I remained open to new information and audio-recorded the interview sessions. I transcribed notes from interviews sessions and member-checked transcripts to identify

potential biases in interpretation. Member checking allowed ABC leaders to review my interpretation of participants' answers to interview questions for accuracy of information, eliminate misrepresentations, and enhance the quality and reliability of the interview (see Saunders et al., 2015; Shaw & Satalkar, 2018; Yin, 2018).

Participants

Researchers in Walden DBA consulting program select participants based on their knowledge of the topic and ability to implement change in the organization (Walden University, 2017). The participants in this study included two co-owners demonstrating the ability to create and implement growth strategies for a mature small IT business operating in the midwestern United States, which I identify in the study by the pseudonym ABC. The primary eligibility for this study required the participants to have an active role in the leadership and decision-making process in their organization. The Walden University IRB required that each participant included in a study meets specific roles and responsibilities within an organization. For example, (a) participants must be leaders within the organization with the ability to create and implement a business change; (b) leaders must be able to enforce the mission, vision, and values of the organization, (c) leaders must interact with stakeholders and shareholders; and (d) leaders must have the ability to provide data and information relevant to the process and procedure of the company.

Qualitative researchers study participants' meaning and the relationship between key players using a variety of data collection techniques to establish trust, participation, access to meanings, and in-depth understanding (Saunders et al., 2015; Yin, 2018).

Leader participants in this study interacted with me as the consultant and were willing to

follow the rules and guidelines of both Walden University and the Baldrige Performance

Excellence Framework (2017). I established a working relationship with ABC by visiting

the business web page and social media sites. I provided ABC with flexible times to

discuss the 40-week service order agreement. Establishing trust and flexibility with

participants' increases participation and is important for data collection and analysis (see

Jordan & Gray, 2018; Ross, 2018; Shaw & Satalkar, 2018). To establish a positive

working relationship with ABC, I conducted a weekly telephone consultation and

maintain frequent e-mail correspondence. In the telephone consultation with the leaders, I

indicated my desire to collaborate, protect their privacy, follow established rules and

guidelines grounded in the *Belmont Report*, and identify key work processes using the

Baldrige Performance Excellence Framework (2017). I also obtained consent and

outlined the risks associated with human subject research (see Jordan & Gray, 2018).

<div align="center">Research Method and Design</div>

Research Method

I used the qualitative research method to explore organizational growth strategies

for mature small IT businesses operating in the midwestern United States. Researchers

use qualitative research methods to gather information and explore phenomenon about

individuals and groups (Park & Park, 2016). Qualitative research requires in-depth

analysis of organizational processes and people without a predetermined bias.

Researchers using the qualitative research method can secure rich information from

participants when using multiple data collection instruments. Qualitative data are

narrative and help explore the lived experience of individuals (Ross, Iguchi, & Panicker, 2018).

The distinction between qualitative and quantitative research is important when choosing the appropriate research method to address the research question. Qualitative research can involve exploring sensitive issues using semistructured interviews to gain critical information from the participant (Yazan, 2015). Quantitative methods are more suitable for examining hypotheses or comparing variables (Yin, 2018). Researchers use mixed methods combining quantitative and qualitative research to address complex topics and obtain a comprehensive finding (Fusch & Ness, 2015; Saunders et al., 2015). I did not test hypotheses or seek to determine a correlation between variables. Therefore, the qualitative research method is appropriate because it aligns with my research question and provided in-depth data on growth strategies for mature small IT businesses beyond current capacity.

Research Design

I selected a single case study design for this study. Researchers selecting a case study design seek to explore and address the *how*, *what,* and *why* of participants' lived experiences and perceptions within their natural context (Ridder, 2017). Four types of case study design are (a) single case design, (b) multiple case design, (c) holistic single unit, and (d) embedded multiple unit of analysis design (Yin, 2018). The single case study allows a researcher to gain an in-depth understanding of the participants (Saunders et al., 2015). The single case study is a set of methods and procedures used to collect, analyze, and measure variables in the research problem being explored or examined

(Alavi, Archibald, McMaster, Lopez, & Cleary, 2018). The purpose of the research design is to address the research question and develop the respective concepts (Guetterman & Fetters, 2018).

Other designs were not suitable for this study. For example, researchers use the phenomenological design to focus on participants' recollections and interpretations of their experiences (Saunders et al., 2015), which did not fit the purpose of this study. Ethnographic researchers observe participants in their natural environment (Draper, 2015), but I did not intend to explore leaders through direct observation.

In a single case study, researchers use open-ended questions to encourage participants to provide extensive answers to established questions (Windsong, 2018), which helps reach data saturation. Data saturation is the point where the same researcher or other researchers can replicate the results when they repeat a study with different participants (Marshall & Rossman, 2016). The failure to reach data saturation has a negative impact on the quality and validity of the research (Fusch & Ness, 2015). I ensured data saturation by interviewing until no new information or themes emerged.

Population and Sampling

The population from which I selected my primary sample of participants was mature small business leaders operating in the midwestern United States. I used a purposeful sampling method to select two participants for this study. Sample size is dependent on purpose of the study and number of participants needed to adequately answer the research question (Saunders et al., 2015). Researchers should select the sample size that has the best opportunity to reach data saturation (Marshall & Rossman,

2016). I ensured data saturation by interviewing as many participants as needed until no new information or themes emerged.

I selected two participants based on the eligibility requirements outlined by the *Consulting Capstone Manual* (Walden University, 2017). The requirements included being leaders of a mature small IT business with historical knowledge of the business and the ability to implement change within the organization. Additionally, qualitative researchers must select leaders with a general knowledge of the problem focus and experience in creating and implementing growth strategies (Benoot, Hannes, & Bilsen, 2016).

I used purposeful criterion sampling for this study because it aligned with focus and intent of my study. Purposeful sampling usually occurs before gathering data, whereas theoretical sampling occurs in conjunction with data collection (Yazan, 2015). I initiated weekly contact with the study participants via phone interview over the 40-week service agreement. Interviews and document reviews are the primary method of data collection for qualitative case studies (Ridder, 2017). In qualitative studies, multiple contacts with participants is necessary to ensure data saturation, as researchers determine new themes and make recommendation (Saunders et al., 2015). I aligned the interview questions with the 2017–2018 Baldrige Excellence Performance Framework to ensure courage of all areas. I reviewed the data to determine if saturation occurred with the two participants. When data and information gathered from semistructured interviews and review of company material revealed no new information, data saturation occurred.

Ethical Research

Ethical behavior is important in academic research and ensures the protection of participants (Chiumento, Rahman, Firth, Snider, & Tol, 2017). Researchers should be aware of the threats to individual privacy and autonomy that arise from reidentification, where sensitive research findings might link individuals or groups (Phillips, Borry, & Shabani, 2017). For instance, research integrity is an important issue in scientific and medical research (Shaw & Satalkar, 2018). Protecting the privacy of participants is a fundamental practice of ethical research (Saunders et al., 2015). One way to formalize this procedure is through an ethical review process that includes both a verbal and written agreement (Hetzel-Riggin, 2017). Informed consent, if transparent, properly structured, and monitored can provide an additional safeguard for participants' privacy. However, informed consent may not ensure the conduct of ethical behavior in research (Chinmento et al., 2017). One method of supporting the informed consent process is providing historical data and background information prior to participant engagement and contribution. Moreover, researchers should provide a well-documented process covering the participants consent, data collection, and information release with specific instructions on their rights before, during and after any research study (Lie and Witteveen, 2017).

Qualitative researchers have fewer ethical dilemmas when research procedures went through an institutional review board or oversight committee (Oye, Sorenson, & Glasdam, 2016). To ensure my study complied with federal regulations as well as the Walden University's requirements for informed consent, I submitted my research request

to Walden University IRB. I obtained IRB approval (03-16-18-0575255) that ensured my study complied with federal regulation and Walden University requirements. I assumed results established in this study might assist organizations with understanding the importance of informed consent when studying mature small IT businesses.

To ensure privacy, I assigned the participants pseudonyms and a fictional name to the organization. I also did not offer a financial incentive to avoid participation bias and fabrication of information for financial gain (Robinson, 2014). However, each participant will receive a summary of the findings from the study. Researchers must remain vigilant to protect the identity of participants during the process of gathering data, data storage, and data analysis (Yin, 2018). I stored data electronically on a secured password-protected personal laptop, and I will destroy copies of redacted documents, interview results, transcripts, and flash drives at the end of 5 years.

Informed Consent

As a requirement of Walden University and ethical responsibility, I obtained informed consent from the participants of the study before conducting research. The proper use of informed consent procedures identifies flawed processes that might affect data collection (Hetzel-Riggin, 2017). Similarly, informed consent promotes voluntariness, mitigate risks, and enhances transparency in research. In addition, informed consent should occur before researchers engage participants (Atz, Sade, & Williams, 2014).

Once I obtained IRB approval, I provided additional instructions outlined in the consent form, including (a) the purpose of the study, (b) participants' requirements, (c)

potential risks and benefits, and (d) the right to withdraw at any time without repercussion to the organization. Researchers use informed consent forms to ensure participants have relevant information to determine if they want to participate in a study (Lie & Witteveen, 2017). I reviewed the content of the consent form verbally with all participants at the beginning of the interviews. Moreover, to ensure the ethical protection of participants and ensure a full understanding of the interview process, the interview protocol includes an introduction script that reminded the participants of their rights to withdraw from this study at any time (see Appendix B). University leaders, government agencies, and professional associations rely on specific ethical standards to protect human rights during research studies, including the right of participants to withdraw at any time for any reason or no reason at all (Shaw & Satalkar, 2018).

Data Collection Instruments

In this qualitative single case study, I served as the primary data collection instrument. Researchers conducting qualitative case studies act as the primary instrument for data gathering, data storage, and data analysis (Ridder, 2017). I collected data from open-ended interview questions, transcripts, and notes from the interview session, company documents, and the company website. To avoid personal bias, researchers must ensure their interpretation of a phenomenon represents the participants' interpretation (Jordan & Gray, 2018). Researchers use member checking to ensure data quality and avoid personal bias that could threaten reliability, dependability, validity, and credibility (Saunders et al., 2015). Robinson (2014) explained that member checking entails conducting follow-up interviews with participants to ensure the accuracy of the collected

data. Yin (2018) defined member checking as a process that allows researchers to provide participants a summary of the interpretation of their responses and verify the accuracy of the review. I reduced my bias through member checking by allowing participants the opportunity to confirm that my analysis of their answers adequately represented the intent of their responses.

I used the 2017–2018 Baldrige Performance Excellence Framework to gain a holistic understanding of the company's operations and performance measures that impact its growth strategy. Researchers use the Baldrige Performance Excellence Framework to collect data in the following areas: (a) leadership; (b) strategy; (c) customers; (d) measurements, analysis, and knowledge management; (e) workforce; (f) operations; and (g) results (Walden University, 2017). I conducted open-ended interviews with each participant. The average time for each interview was 30 minutes, and additional time was available. Researchers conducting interviews implement an interview protocol before the interviews to ensure consistency with the interviewing process (Windsong, 2018). The interview protocol framework included four stages, which were (a) ensure the interview questions aligned with the research question, (b) explain the interview protocol with each participant, (c) receive and analyze conversation between researcher and participant, (d) using member checking to ensure accuracy. I maintained the integrity of this qualitative single case study by following the member checking and the interview protocol (see Appendix B).

Data Collection Technique

The data collection techniques selected for this qualitative single case study were semistructured telephonic interviews and a review of transcripts, interview notes, e-mails, the business website, the employee handbook, and other documents. Researchers use interviews to explore workplace complexities in greater depth than archival document reviews (Boddy, 2016). Researchers record in-person and telephonic interviews to gain a better understanding of the participant views and to ensure accuracy when preparing transcripts for analysis (Phillips, Borry, & Shabani, 2017). Before each interview session, I provided e-mails to confirm the time and date. I used interviews conducted by telephone as my primary method of collecting information from each participant. I aligned my semistructured interview questions with my topic, along with the 2017-2018 Baldrige Performance Excellence Framework.

Researchers should understand that using interviews as the primary data collection technique involves both advantages and disadvantages. For example, interviewing participants is a highly skilled task, and researchers must allocate time and training to become proficient. Even seasoned researchers have problems with personal bias and maintaining an interview protocol (Windsong, 2018). A semistructured interview is one of the strengths in conducting qualitative case study research (Robinson, 2014). Miracle (2016) noted that a researcher and participants could engage in a meaningful dialogue in real-time during semistructured interviews. Review of organizational documents can provide additional data through the process of methodological triangulation (Yin, 2018). In addition to interviews, I reviewed internal

and external documents such as the employee handbook, company financial reports, website, and interview notes to understand the organizational growth strategy better.

Researchers reviewing internal and external documents must understand that there are advantages and disadvantages to each technique. Yin (2018) reported that document reviews could provide additional support to enhance interviews accuracy. However, Windsong (2018) argued that many researchers do not have experience reviewing a large number of documents due to cost and time limitations. Research conducted by Varpio and Meyer (2017) recommended member checking to ensure validation of the research findings to the participant's experience. I used member checking to allow participants the opportunity to validate my interpretation of their responses from the semistructured interviews.

Data Organization Techniques

To track data, I created a filing system that will allow me to identify and assess data, chart essential notes, and track important information. Becoming familiar with the data collected involved a process of immersion that continued throughout the research process. Some researchers create and maintain a journal to enhance their knowledge of the material and reduce the time spent locating needed information (Shaw & Satalkar, 2018). I maintained data by using an electronic folder on my computer. I named the files according to the topic and date of the data.

Researchers can protect the identity of clients by assigning generic names and codes to participants and data (Saldana, 2015). I masked the names of the assigned participants by assigning code names; for example, the pseudonym for the organization is

ABC, and the interview participants' code names are Participant 1 and Participant 2. I maintained a commitment to IRB rules and client confidentiality and only presented redacted and relevant information in the study. Fusch and Ness (2015) noted that care is essential when conducting qualitative research by restricting access to crucial information and properly destroying data in compliance with proper procedures. According to Hammad (2016), data should be password-protected on devices and destroyed when no longer required. I stored all information with password protection to ensure I was the only one that could view the raw data. All data will remain password protected for 5 years after completion of the study. After the 5 years, I will destroy all material by shredding and electronic erasure.

Data Analysis

Researchers conduct qualitative case study data analysis to discover new ideas and increase their understanding of business phenomena (Ganapathy, 2016; Saunders et al., 2015; Yin, 2018). Fusch and Ness (2015) promoted using methodological triangulation to reach data saturation. Methodological triangulation enhances credibility with the use of multiple data sources to identify new themes (Ganapathy, 2016). Researchers can use various data sources to cross-reference data and ensure accuracy from semistructured interviews and archival documents (Windsong, 2018). Researchers usually triangulate data as part of their data collection strategy, which results in a detailed case description (Ridder, 2017).

I used methodological triangulation to analyze the data from semistructured interviews, financial reports, company handbook, archived documents, social media, and

company websites. I transcribed the interview data recording after each session and used member checking to ensure I captured the meaning each participant intended. After reviewing internal and external documents and transcribing interview questions, I charted new themes to a color-coded system. According to Saldana (2015), the classification of the codes helps develop statements and grouping into the proper units. By using color coding, I designed and provided a storyline for the research for the major themes of the study. Coding is a simple but versatile and valuable tool that allows researchers to rearrange original data into groupings for next-stage analysis (Saunders et al., 2015). I reviewed all data sources and used methodological triangulation to explore the growth strategies leaders use in mature small IT businesses.

I remained aware of personal bias during the data analysis phase and used member checking to ensure the accuracy of information. I used cross-reference codes and themes with elements from GST, peer-reviewed journals, and seminal works on growth strategies for mature small IT businesses. Researchers contribute to the field of study when they conduct data analysis by integrating scholarly literature and new themes from case studies (Irvine & Irvine, 2018). Researchers correlate findings with the literature and conceptual framework to confirm, disconfirm, and extend the extant literature (Marshall & Rossman, 2016). I used the 2017–2018 Baldrige Performance Excellence Framework to collect and identify new themes and correlated the findings with the literature and conceptual framework that contribute to the growth strategies of mature small IT businesses.

Reliability and Validity

Reliability

Researchers must consider the validity and reliability of data collection instruments when either conducting or critiquing research (Heale & Twycross, 2015). A researcher conducting a qualitative study achieves reliability when the results are dependable and reflect the stability of the data (Yin, 2018). According to Wingsong (2018), reliability refers to how one will address dependability. Although reliability is a crucial characteristic of research quality, it is not sufficient by itself to ensure good-quality research (Saunders et al., 2015). Case study researchers must guarantee reliability by complying with case study protocol and databases (Yazan, 2015). Similarly, Yin (2018) reported following an interview protocol helps to increase the reliability of case study research by guiding the data collection process. Reliability for this study began with following the Walden University consulting capstone protocol outlined in the Walden DBA consulting manual (Walden University, 2017).

I ensured the dependability of the case study by using methodological triangulation and member checking. Dependability is a parallel criterion to reliability, to record emerging changes to a phenomenon and report the changes in such a way that others can understand and evaluate the data (Lewis, 2015). Researchers can triangulate semistructured interviews, archived documents, notes, and coded data to enhance the rigor of qualitative research (Saldana, 2015). Furthermore, member validation and collaboration are essential in qualitative research (Levy, 2015). Data saturation involves interviewing enough participants to the point where no new information or themes

emerge (Fush & Ness, 2015). I reached data saturation after interviewing two

participants. I collected data from the interview questions and reviewed transcripts to

influence reliability by way of the interview protocol and to ensure reliability, and I asked

open-ended questions in the same stance for both participants. Member checking allowed

participants to ensure interpretations made sense in the context of their experiences on

growth strategies for mature small IT businesses. Reaching data saturation will help

assure the dependability of the findings.

Validity

The goal of this study was to explore reliable and valid processes and data that

reduce the chances of bias and misinterpretation. Validity in qualitative research refers to

the credibility, confirmability, and transferability of a case study finding (Heale &

Twycross, 2015). Similarly, researchers use internal and external validity techniques to

establish the accuracy of data (Ridder, 2017). Researchers can enhance credibility by

member checking the data interpretation, participant transcript review, triangulation, and

interview protocol (Marshall & Rossman, 2016). I demonstrated qualitative credibility by

using member checking of the data interpretation, triangulation, and followed the

interview protocol to ensure my summary addressed the phenomenon from the

perspective of the participant.

Lengthy research involves building trust and rapport and collecting sufficient data

(Park & Park, 2016). Researchers can enhance confirmability by ensuring interview

results are confirmed or supported by others (Mihaela, 2017). I provided confirmability

by using probing questions during the interview process and following up with member

checking of the data interpretation, questioning from different perspectives, and triangulation. However, Saunders et al. (2015) noted that adapting external validity to qualitative research involves challenges because a small sample size limits the transferability of studies. I eliminated bias by collecting data from multiple sources, using an interview protocol, transcribing notes from the interview, and allowing ABC to validate my findings.

I allowed others to determine transferability by adhering to the interview protocol, IRB guidelines, and informed consent agreement. The burden of demonstrating that a set of findings applies to another context rests with another researcher's determination of transferability (Marshall & Rossman, 2016). By providing a full description of the research questions, design, meaning, findings, and interpretation, qualitative researchers offer readers the opportunity to judge the transferability of the study (Boddy, 2016). In contrast to quantitative studies where the researcher generalizes the findings, qualitative researchers do not speculate and do not state that the results are transferable (Heale and Twycross, 2015). When researchers provide full, rich, and unbiased descriptions of the research questions, findings, and interpretations in a study, future readers can determine the transferability of one study to another. Yin (2018) concluded that rigor is a critical component of qualitative research because it requires researchers to apply existing theories, use current literature, and add data that strengthens qualitative research and offer greater insight for future researchers. To ensure reliable results, I (a) verified participant role and responsibility in the organization, (b) member checked for accuracy, (c) triangulated the data using multiple sources, and (d) compared the interview data to the

existing literature and the case study's conceptual framework. I reviewed the GST to determine viable ways to measure organizational success. GST supported the value small mature IT business owners placed on growing their business beyond current capacity and understanding the complex systems necessary to sustain long-term growth and profitability.

Transition and Summary

Section 2 included the purpose of the study, the role of the researcher, research method and design, and data collection instruments and techniques. I described the plan to conduct ethical research and to ensure reliability, credibility, confirmability, transferability, and validation of the study. Two leaders of a mature small IT business in the northwestern United States participated in semistructured telephonic interviews to explore the growth strategies of mature small IT businesses. I continued to interview the participants and reviewed company documents until reaching data saturation.

In Section 3, I will use the 2017–2018 Baldrige Performance Excellence Framework to conduct an in-depth review of ABC. I will focus on (a) an organizational profile; (b) leadership; (c) customer relationships; (d) measurement, analysis, and knowledge management; (e) workforce; (f) operations; and (g) results of processes and products. I conclude Section 3 by providing an executive summary of key findings, project summary, contributions, and recommendations.

Section 3: Organizational Profile

Small business leaders use an organizational profile as the primary method to describe the organization (Baldrige Performance Excellence Framework, 2017). The Baldrige Performance Excellence Framework (2017) consists of six components that integrate into a system anchored by an organization's mission, vision, and values. Business leaders can follow the six categories to define the processes and to achieve results (Baldrige Performance Excellence Framework, 2017). Leaders using the Baldrige performance worksheet can gain insight into organizational process and performance (Baldrige Performance Excellence Framework, 2017).

Key Factors Worksheet

Organizational Description

ABC is a family-owned and operated small business that specializes in providing computer consulting services to small business and IT professionals. ABC began as a family-owned computer consulting business located in a home-based office. The primary focus of the business was to provide affordable and reliable computer consulting and repair services to the local community. The founders of ABC eventually moved the business to a downtown store to provide better access to the community and to expand services to clients.

ABC originated from the owners' desire to create a better work–life balance and the desire to shield themselves from company layoffs and economic disruption. According to Morgan and Sisak (2016), fear of failure and past job loss contribute to the desire of many entrepreneurs to open small businesses. ABC is a small business

consisting of two owners and one computer technician. After opening the downtown location, the owners expanded services into sales, load operating systems, specialized software installation, and consulting services to other small business owners. Considered a mature small business in operation for 13 years, the leaders of ABC Company were seeking growth and expansion beyond their current capacity.

Organizational Environment

    Product offering. ABC leaders provide consulting services to small business owners typically unable to afford full-time IT services. The leaders of ABC created a niche market with local small business owners operating with 10 or fewer work computers. The company expanded to the storefront location in October 2017 and expanded products to include remote monitoring and computer hardware. Additionally, ABC offers computer diagnostic services, data recovery, computer cleanup, in-home support services, and other types of repairs. The leaders of ABC Company provide technical expertise in the IT field. ABC's secondary product offering includes remote computer repair and on-site emergency recovery services. Inside the physical locations, ABC customers can also purchase refurbished laptops and computers, computer cards, and computer replacement and upgrade systems.

    Mission, vision, and values. ABC Company's mission is to partner with individuals and businesses to keep its technology running optimally to ensure the company meets overall goals. Leaders of ABC pay attention to the needs of clients and the community. ABC Company strives to work with the community and to serve as a social change agent for small business owners and local residents. For example, ABC

leaders hold quarterly open-house events to educate the public and to foster collaboration within the local community.

ABC Company's vision is to expand using growth strategies and to provide high-quality and dependable IT services to business owners and individuals seeking professional IT services. ABC employees operate on three distinct values: integrity, efficiency, and skill. According to Participant 2, "we have worked together to create customer values over our years in the business." ABC's core competency incorporates complex problem-solving skills, ensures the memory retention of solutions, assesses and solves problems quickly, listens intently to clients' computer problems, and relates professionally to people in a way that inspires trust.

Workforce profile. The paid workforce hierarchy for ABC comprises three full-time employees, two computer technicians, and one marketing manager (see Figure 1). The co-owners share in the leadership and bookkeeping requirements. Office hours are Monday–Friday 10 a.m. to 6 p.m. and Saturday 10 a.m. to 2 p.m. The computer experts work an average of 40 hours per week, and the marketing manager works 20 hours per week. The leaders of ABC conduct monthly training sessions designed to develop leadership and communication skills. The leaders of ABC have a primary mode of training, which is face to face, and the primary resource is Dave Ramsey's Entreleadership All Access Program. During the monthly staff meeting, leaders of ABC discuss business problems, set and review progress toward quarterly goals, and watch educational and team-building videos. ABC leaders meet monthly with local small business owners under the leadership of Dave Ramsey's Financial Peace University

curriculum to discuss organizational growth, financing, and sustainment strategies.

According to Participant 1, there are no specific educational requirements for the various

employees. ABC's recent workforce changes included hiring a new computer expert and

implementing a pre-employment assessment tool. According to ABC leadership, there are

no organized bargaining units or special health and safety requirements. The leaders of

ABC determine the key drivers of workforce placement, job assignments, cost and

pricing, and salaries.
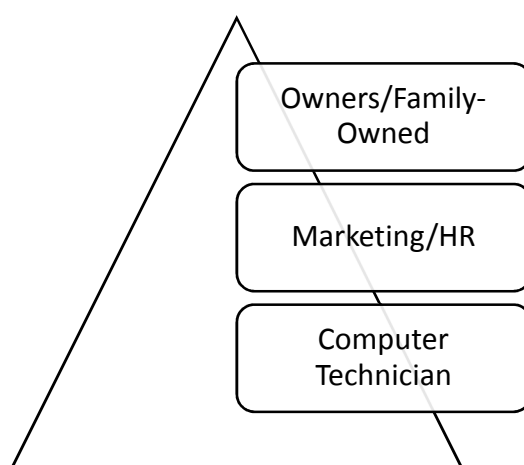
Figure 1. ABC's workforce profile.

Assets. The main assets of ABC are three employee laptops, two desktop

computers, diagnostic equipment, hard-drive reader, heat gun, screwdriver sets, and static

pads. In addition, ABC has seven laptops and six desktop computers (refurbished),

various cards, computer accessories, and video cards for sale. ABC has two personal

vehicles with the company logo painted on to increase marketing. ABC founders are

leasing the downtown space and continue to perform administrative work inside the home

office. ABC 2017 assets totaled $46,600 (see Table 1).

Table 1

Assets for ABC in 2017

Asset	Amount
Petty Cash	$ 7,000.00
Accounts Receivable	$ 22,000.00
Inventory	$ 2,000.00
Prepaid Expense	$ 1,800.00
Fixed Assets:	
Equipment	$ 2,500.00
Furniture	$ 300.00
Automobiles/Vehicles	$ 11,000.00
Total Assets:	*$ 46,600.00*

Regulatory requirements. ABC is a for-profit S-Corporation registered with the State of Minnesota. Although there are no specific regulations under which ABC must operate, the leaders of the organization ensure they maintain and follow all Minnesota state labor standards and Occupational Safety and Health Administration standards. ABC founders and employees also comply with Internal Revenue Service rules, regulations, and tax codes. ABC does not have any accreditation or certification requirements, industry standards, or environmental or product licensing standards outside the product use required for all users. However, the State of Minnesota requires city and state tax identification numbers for all buildings used as a for-profit business. ABC self-regulates by collaborating with local electronic recycling companies, which is covered by the State of Minnesota. A complete list of ABC regulatory requirements appears in Table 2.

Table 2

ABC Regulatory Requirements

Workforce	Occupation Safety and Health Administration Standards
State requirements	Minnesota State Labor Standards
Organization	900 Tax Form
Electronic recycling	Environmental Protection Agency
Charitable contribution	501(c)(3)

Organizational Relationships

 Organizational structure. ABC is a technology consultant and service provider that currently operates as a for-profit S-Corporation in the midwestern United States. ABC is a family-owned business and does not have an executive board or outside governing body. ABC's organizational structure consists of two co-owners performing day-to-day operations, with one owner focusing on computer technology and the other focusing on marketing and management tasks and supervising one computer technician. ABC does not have a parent organization or governing board, and the co-owners make all financial, hiring, and operations decisions.

 Customers and stakeholders. ABC key market segments include small businesses within the local and regional community. ABC provides contract services to 35 businesses with monthly service contracts for computer maintenance and service calls. ABC also provides as-needed services and walk-in support at the downtown store location. ABC primarily provides laptops and desktops services and repairs to local

customers. Key customers and stakeholders for ABC are community members, local business leaders, community colleges and universities, and regional business communities. ABC's market segments are three cities in Minnesota: Ramsey, Elk River, and Minneapolis/St. Paul.

Suppliers and partners. ABC suppliers and partners were instrumental in relocating to a downtown storefront location. ABC suppliers include all major computer manufacturers and producers. ABC is a computer consulting company specializing in maintenance and repair services. ABC key partners include local educational institutions, students, computer owners, businesses, and the local workforce. The relationships between suppliers and partners are instrumental in marketing computer services to the public (Greenspan & Wooldridge, 2018). The leaders of ABC host monthly lunch-and-learn functions with local suppliers and partners to share information and to promote innovation. ABC does not have one major supplier; instead, company leaders draw on multiple suppliers for hardware and computer products for customers.

ABC leaders use a combination of networking tools to build awareness and relationships. For example, leaders of ABC attend social events; small business advocacy meetings; and civic, educational, and sports activities to promote their services. ABC leaders use web-based media, social media, traditional media, e-mail, and electronic newsletters to promote ABC's services. The leaders of ABC meet throughout the year with suppliers, partners, and collaborators to maintain open communication (see Table 3).

Table 3

Key Suppliers, Partners, and Collaborators

Suppliers, Partners, and Collaborators		Influence on Organizational Systems	Influence on Innovation and Competitiveness
Suppliers	Walmart, eBay, Best Buy	Provides computer software, parts, and supplies.	Understands current trends and best practices IT industry.
Partners	Community College, Chamber of Commerce and Rotary, High School	Provides workshops and resources to individuals in the community. Provides resources and support to the community.	Helps communicate the mission, vision, and values of ABC to the community.
CL	Amazon, Best Buy, Business Network International	Provides money and specialized medical care	Provides funding and safety-net of medical services

Organizational Situation

Competitive environment. Small business leaders must recognize the competitive environment to meet long-term strategic goals. The organization's strategic situation includes competitive position, competitive changes, comparative data, strategic context, and performance improvement systems (Baldrige Performance Excellence Framework, 2017).

Competitive position. Competitors of ABC include three computer companies located within 8 miles of the downtown storefront. One of ABC's competitors offers similar services, has maintained the same location since 2011, and is well-known within the community. Another competitor of ABC has been operating within the local

community since 1997 and has a well-established customer base. The third competitor is

a nationally known company. The nationally known company is a powerful national

brand conveniently located inside a major electronic-based department store (Lee & Kim,

2016). ABC leaders understand the strengths and weaknesses of their competitors and

remain competitive based on personal service, price, and location.

Competitiveness changes. Regarding competitors, ABC has identified the

number of competitors, length of services, and service similarities. Changes in

competitors' operations influenced ABC to focus on personal services, brand loyalty, and

social and civic involvement. The longevity of two of the competitors led ABC leaders to

open a downtown store location to promote more foot traffic. The competition from the

national name brand mobile and personal services led ABC to compete using a cost

advantage. ABC offers discounts to loyal customers and seeks to connect with them

through personal relationships.

Comparative data. Specific comparative data for two of the local competitors are

not readily accessible or published. Collecting comparative and competitive data proved a

challenge for ABC leaders because of the size of the organization. However, information

on the national brand is available to the public on the national brand's webpage. IT

leaders concluded that technology and innovation drive competition in the IT field (Kim

et al., 2016). According to Ellis and Fender (2016), the market continues to shift due to

the innovation and affordability of smartphones and laptops. ABC leaders frequently

attend small business seminars and luncheons to gather data on local competitors and

industry trends. According to Participant 1, there is limited comparative data on the

competitors, and there is a lack of understanding of the effect that the data have on the growth of ABC.

Strategic context. The key strategic challenges for ABC include recruiting new applicants and hiring competent computer experts. In 2017, ABC terminated the employment of their computer service technician due to lack of motivation to seek additional skill training. Competition from national computer repair and software companies poses additional challenges. For example, many companies offer remote repair, security, and maintenance services to clients without the added demand of leaving their home to deliver their computer for repair or maintenance. ABC combats this challenge by providing price advantages for contracted clients. ABC leaders strive to create advantages and decrease challenges through technical expertise, social and civic engagement, and environmental responsibility.

Performance improvement system. Leaders of ABC use training improvement systems and processes to evaluate services and productivity**.** Dave Ramsey's Entreleadership All Access Program was the primary performance improvement system used by ABC. The owners of ABC meet monthly with local small business owners training with the Financial Peace University's program to discuss performance outcomes and future goals. Although ABC does not have a board of directors to report spending, obligations, and trends, the leaders of ABC measure performance against quarterly goals and annual financial returns. ABC leaders also meet monthly with their employees to discuss goal setting, industry trends, and productivity. The co-owners of ABC collaborate weekly to access their performance and set future goals for growth and expansion.

Although proud of their long-term success, leaders of ABC noted key strategic challenges included the lack of a board of directors or governance body, the lack of formal evaluation standards, and leaders' views on growth and expansion. Similarly, leaders of ABC reported key strategic advantages such as social and civic involvement, skilled technicians, community support and engagement, being customer centered and environmentally responsible, and having faith-based principles.

Leadership Triad: Leadership, Strategy, and Customers

Small business leaders accomplish organizational goals by providing guidance, direction, and purpose. A successful organization understands that some risk is always present, and leaders within the organization determine and oversee risk tolerance (Baldrige Performance Excellence Framework, 2017). A successful organization can address current business needs and, through agility and strategic management, can prepare for its future growth, market, and operating environment (Keasey et al., 2015).

Leadership

Senior leadership. The senior leaders of ABC include two co-owners and one senior computer technician. The leaders' top priority is technological innovation and customer service. The leaders of ABC lead by example to encourage respect and dignity for staff and customers. The mission, vision, and values of ABC continue to evolve as this family-owned business seeks to grow and expand. The co-owners revamped the mission, vision, and values using Entreleadership training conducted as part of Dave Ramsey's Financial Peace University program. The co-owners of ABC reinforce the

company's core values of integrity, honesty, and professionalism in their everyday performance and interaction with stakeholders.

The co-owners and computer technician communicate by annually reviewing and signing the employee handbook, as part of the ethical and legal continuing education for the business. The leaders of ABC use the company handbook to ensure compliance with state and federal laws that govern business operations. The founders of ABC communicate their Christian values and the alignment of biblical principles with their business operations. The leadership team uses a combination of business strategies and biblical principles to meet the organization's mission, vision, and values.

The primary methods of communication from leaders to the workforce and customers are personal, one-on-one conversations, e-mails, teleconferences, text messages, Instagram, Facebook, and traditional print. ABC's Entreleadership program has a weekly report tool that operates through a network of websites to gather feedback from all stakeholders. Leaders of ABC conduct monthly meetings with employees, clients, and stakeholders to discuss long-term goals, customers' needs, and current trends in technology. The leaders of ABC are active members of civic, social, athletic, educational, and religious organizations in the local community. The leaders of ABC encourage their employees to focus on achieving the mission by setting daily, weekly, and quarterly goals. Although a formal communication plan does not exist, ABC's owners outlined key tasks that focus on understanding long-term growth, building relationships, and professional development.

Governance and societal responsibilities. ABC does not have a governance board assigned to evaluate the performance of senior leaders**.** The leaders of ABC have not conducted any formal succession planning. The leaders prepare their taxes, perform accounting responsibilities, and track billing costs. The family-owned business leaders meet weekly to discuss personal and business finance. The health and safety risk for the business is low; common injuries associated with computer programmers are muscle and tendon problems, the strain on eyes, and carpal tunnel (Kooij & Zacher, 2016). The leaders of ABC ensure transparency by providing employees with a copy of their performance evaluation and conducting new employee orientation training in the first 2 weeks of employment.

The leaders of ABC anticipate potential community concerns by discussing current and future policies with their mastermind group. The leaders of ABC demonstrate good business ethics and citizenship by conducting business ethically and professionally. To further ensure ethical behavior, ABC leaders might implement a grievance policy report system. ABC leaders demonstrate their commitment to social and environmental principles by conducting free events that highlight recycling and by providing information to customers on drop-off sites to discard electronics. ABC also partners with local recycling companies to support state and national policies on disposing of ink and electronic equipment (see Table 2).

The leaders of ABC actively support and strengthen the community by participating in events, such as Save the World! Recycling Event, How I.T. Works: A-Class for the Curious (a parent–child group working on laptops), Earth Day Upcycle

events, and 55+ Ask a Computer Expert events (an open forum and Q&A for seniors).

ABC is a family-owned, Christian-based business, and the leaders support their

community and business by inviting local churches to display flyers into their business.

The co-owners of ABC serve as basketball, baseball, and softball coaches and sit on the

board of directors for local youth basketball programs. The leaders of ABC teach Bible

studies at their local church and mentor boys and girls in their community. The ABC

organization might benefit from hiring an external audit agency to access their processes,

practices, and operations on a 5-year schedule.

Strategy

Leaders must gain knowledge and understanding of strategic development and

implementation (Baldrige Performance Excellence Framework, 2017). The key strategic

objective for ABC was to establish long-term growth beyond current capacity. While

strategic development stimulates and incorporates innovation by analyzing relevant data

to meet long-term goals, strategy implementation addresses the way leaders deploy action

plans to achieve longer-term planning horizons (Baldrige Performance Excellence

Framework, 2017).

Strategy development. There is currently no formal strategic planning document

at ABC's business location. However, the leaders of ABC discuss goals during quarterly

and monthly family planning sessions. The co-owners share their progress during

monthly mastermind meetings with the Dave Ramsey Entreleadership group. For

example, the monthly meeting includes discussions on expanding to new locations,

building larger networks with other organizations, and setting short- and long-term goals.

A short-term strategic goal was to increase walk-in traffic by five per week and add five new business clients during the third quarter of 2018. ABC leaders planned to place additional road signs near the shop to increase visibility in July 2018. The leaders of ABC planned to review all Google feedback and follow up with all clients within a month. ABC leaders' long-term goal was to increase annual revenue to $300,000 by the end of 2018. The leaders of ABC planned to meet this goal by implementing new e-mail subscriptions, Google reviews, and visiting potential clients with cold house calls. Although the leaders of ABC set priorities for the organization discussion during monthly group meetings, the co-owners of ABC seek to create a written strategic plan moving forward.

Innovation. The leaders of ABC sought opportunities for innovation using feedback from Google review products. The feedback received from Google reviews by customers provided insight for ABC leaders to discuss during monthly staff meetings. ABC operates in the technology platform, and it uses social media to network and stays current on new trends and equipment in the IT industry. ABC leaders continue to brainstorm new ideas with the mastermind group. For example, a new sports complex might allow ABC to purchase advertisement and a billboard for computer services. The leaders of ABC plan to continue networking at sports, social, and civic activities.

Strategic considerations. ABC attempts to remain at the forefront of emerging IT by renewing IT certifications for the primary technicians. As a mature small IT business, ABC is not exempt from many of the challenges brought about by technological disruption. Through partnering with a mastermind group during monthly meetings, ABC

owners improved their leadership, recruitment, and strategic planning skills. ABC leaders are open to new ideas and often receive transformational knowledge through established networks, small group meetings, and sporting activities.

Work system and core competency. The key work system for ABC revolves around a shared Microsoft Outlook calendar. The calendar determines and tracks the current job status and projected work schedule. The leaders of ABC plan to transition into the RepairShor software and ticketing system to allow for improved tracking of time, tracking of supplies, and ticket order resolutions. ABC does not have a written guide for the core competencies but focuses on customer satisfaction and timely and professional services. ABC leaders combine their family-based faith system into their core business competency; for example, by using biblical principles of fairness, integrity, and hard work to drive their business practices. Moving forward, aligning the work system and core competencies with a well-established growth strategy will be crucial to ensure growth and debt reduction.

Strategic implementation. The co-owners at ABC transform the feedback from their Entreleadership meeting into actionable items. The co-owners meet with the mastermind group monthly to discuss leadership and goal-setting strategies. The co-owners of ABC consider growth and debt reduction as their top priority. Since ABC moved to a fixed location downtown, increased foot traffic and debt reduction have been the owners' top priority. The long-term plan for ABC is to expand to a third location, improve the professional development of the staff, and increase revenue each year. The owners of ABC continue to track their progress using spreadsheets and billing statements.

The creation of a new sports complex within walking distance to their store provides great potential for increased foot traffic.

Strategic objective considerations. Knowledge gained from monthly participation in Dave Ramsey's entrepreneurial leadership program provided leaders of ABC with the basic leadership skills needed to operate, sustain, and grow their small IT business. The leaders of ABC realized the financial and human capital limitation of owning and operating a family-owned mature small business. In 2019, ABC owners' long-term goals include expansion and debt reduction. The company leaders continue to seek and implement new ideas to overcome the challenges faced in a family-owned small business. ABC leaders sought to fulfill one of their long-term goals in 2017 by moving from the safety of their home office to a new storefront location in their local community. The move was a direct result of the growth in the leadership of both co-owners and their ability to learn and implement new ideas from the mastermind group participants with Financial Peace University's financial program.

Action planning. ABC leaders developed and implemented action planning during mastermind meetings with staff and colleagues. The short-term action plan was to increase revenue by $5,000 per month. The plan to action to accomplish this goal was a two-step process. The first step was to increase walk-in traffic by five customers each week. The leaders of ABC planned to increase marketing in high-volume walking areas close to the store. The second step was to add five new business clients to increase revenue by $2,000–$7,000 per month. The plan of action to accomplish this long-term goal was to migrate business clients to RepairShor computer program and produce

accurate billable time for the remainder of 2018. ABC might achieve the company's long-term goal of securing a third location for the business by reducing overhead cost, eliminating personal debt, and using available line of credit.

Action plan deployment. The key workforce plan for ABC was to develop and implement the short- and long-term action plans. The short- and long-term goal was to increase net profits by $5,000 per month and rent a third location for growth and expansion. In 2017, ABC moved to a new storefront, but the co-owners realized that renting space did not align with their long-term plan. The leaders of ABC break down their goals into weekly, monthly, and yearly objectives and discuss their achievement during weekly staff meetings and monthly mastermind sessions with members of Dave Ramsey's mastermind group.

Resource allocation. The leaders of ABC strive to align their resources with their short- and long-term goals. The relocation was costly and required the co-owners to use their business line of credit for the first time in 12 years. The cost associated with renting, marketing, and equipping a store provided additional financial stress on the small family-owned business. The owners of ABC plan and spend modestly and make careful decisions on non-payment funds (see Table 4). The primary source of income outside of sales and services is the business line of credit. ABC's modest spending and balanced decision making reduce the chances of overspending and relying on personal finances to meet business responsibilities.

Table 4

ABC Spend Plan 2017

Expense	Amount
Liabilities	$0
Current Liabilities:	$0
Accounts Payable	$ 0
Notes Payable	$19,000.00
Taxes Payable:	$0
Federal Income Tax	$ 200.00
State Income Tax	$ 100.00
Self-Employment Tax	$ 100.00
Sales Tax (SBE)	$ 200.00
Property Tax	$ 0
Payroll Accrual	$ 2,400.00
Line of Credit	$ 5,500.00
Total Liabilities	*$27,500.00*

Workforce plans. The leaders of ABC implemented workforce plans to accomplish both short- and long-term goals. ABC owners discussed weekly plans with the staff and provided stakeholders with detailed plans to meet short- and long-term goals. The paid workforce consists of one computer specialist and two co-owners. The family-owned business relies on professional management from the expertise of the co-owners.

Performance measures. ABC leaders track the number of new and repeat computer services and product sales using computer billing programs. ABC leaders followed and communicated performance measures by tracking customer feedback summaries, social media surveys, and replicate repair cost associated with deficient

repairs. ABC also measures performance by increased business revenue and increased foot traffic in the store.

Performance projections. ABC leaders discuss their short- and long-term goals during the mastermind group meeting and weekly staff meetings. ABC leaders discuss current and future performance requirements during staff meetings. In 2017, ABC leadership replaced their computer technician due to low performance and motivation. Leaders of ABC recently hired a computer specialist and placed strict conduct and performance measurements in the contract. The owners of ABC also developed and implemented a company checklist and organizational orientation meeting with the new hire. The co-owners provided additional information on performance improvement to increase personal and professional development.

Action plan modification. ABC leaders reviewed and analyzed their short- and long-term action plan tracked performance and aligned their resources to keep up with technological disruptions and innovations. ABC leaders monitored weekly performance against established measurements. ABC leaders projected future decisions on weekly performance, customer feedback, and social media surveys. The leaders of ABC sought continued improvement and modified their action plan by increasing the budget on technology, such as using Google AdWords. The rapid execution of plans is not an issue for ABC, as the owners set goals, measure performance, and make the necessary changes to improve productivity.

Customers

  Voice of the customer. The key customers at ABC included private computer

owners, local businesses, and community colleges**.** ABC provides computer support,

services, and products to multiple segments of the local population. ABC's primary

method of interacting with its customer is face-to-face. ABC leaders follow up with

customers via automated e-mails on day 3 and month 6. Day 3's email invites customers

to call in with questions on software operations or procedures. The 3 and 6-month auto-

reply email reminds clients to contact ABC with additional concerns, services, or general

questions. ABC is currently implementing John Kotter's eight-step value model to obtain

actionable information of clients (see Figure 3). The model addresses creating a climate

for change, engaging and enabling the organization, and implementing and sustaining for

change.

Figure 2. John Kotter's eight-step model.

  Potential customers. To attract potential customers, ABC engages with college

administrators, business owners, and private consumers to understand their IT desires and

needs. ABC leaders' follow-up with former clients to discuss their experience with the business. ABC does not formally obtain feedback from competitors' customers, but the leaders of ABC interact with community and business leaders to get information on competitors' best practices and opportunities for improvement. ABC leaders work closely with several business owners using the Mastermind leadership tool established by Dave Ramsey to share current information on IT, leadership, and businesses practices.

Determination of customer satisfaction and engagement. A leader must determine and customize the process for product offerings that serve their clients and gain additional information and support (Baldrige Performance Excellence Framework, 2017). Mature small business owners should identify segment populations in specific markets to build relationships and managing complaints (Peric & Vitec, 2016). Small business leaders should aim to improve market share, build brand loyalty, and enhance customer satisfaction (Baldrige Performance Excellence Framework, 2017).

Satisfaction, dissatisfaction, and engagement. The leaders of ABC work hard to provide quality services, products, and repairs to their customers. ABC leaders track customer satisfaction through the repeated use and purchase of products and services. Data gained through staff and mastermind group meetings enhance the understanding of leaders to address both positive and negative feedback from customers. ABC leaders also monitor social media, e-mails, and company websites in attempts to track customer satisfaction, dissatisfaction, and general concerns regarding products and services. ABC receives and consolidates customer feedback and uses the information to determine future strategies for product and service improvements. Based on the close social and civic

networking community, ABC leaders find it easy to identify positive and negative service areas. ABC owners continue to make every effort to improve community engagement by conducting monthly open-house meetings at their store.

Satisfaction relative to competitors. ABC leaders rely on customer feedback and word-of-mouth to gauge the level of achievement relative to competitors. The leaders of ABC can determine customer satisfaction by analyzing software-generated feedback surveys, mailing lists, monthly billing statements, event attendance, social media activity, and foot traffic inside the store. The owners of ABC established weekly, monthly, and yearly goals based on long-term projections, increased service request orders and product purchase orders, and renewed security system update requests from customers.

Customer engagement. Customer engagement is the client's loyalty to the business and the products offered (Baldrige Performance Excellence Framework, 2017). Leaders engage customers to increase profit and provide support and solutions to customers' problems. The goal of customer services is to build brand loyalty and respond to customers' expectations (Dragnic, 2014).

Product offerings and customer support. The products offered by ABC include computer repair services, security software upgrades, computer parts and equipment, and computer training and skill improvement. ABC leaders determine the product and service offerings based on IT trends and the security and financial needs of customers. ABC encourages feedback from customers using an automated software system that reaches out to previous customers at intervals of 3 days and six months. The leaders of ABC use the input from current and previous clients via e-mail, social media, product software,

and face-to-face discussions to improve delivery timelines, reliability, and technical

support and to customize services to meet client needs.

Customer support. ABC leaders provide customers support as a core element of

their mission and vision statement. ABC uses a multilevel marketing approach to

highlight services, location, business hours, and products. ABC priority in customer

support is to make their services more accessible and to make their products easy for

customers to purchase and use. The owners of ABC continue to seek ways to improve

their responsiveness to customers. For example, the company moved into a downtown

store and hired a computer service specialist for walk-in service. ABC also provides

customers with a computer-generated and telephonic call center to address computer

program needs. The call center and e-mail notifications allow ABC employees to respond

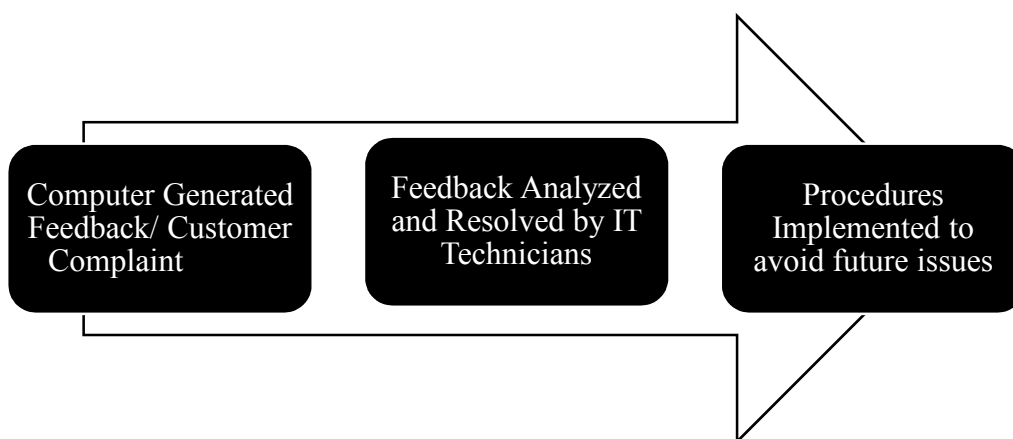quickly to support the needs of the customer (see Figure 3).

Figure 3. ABC customer engagement and support.

Customer segmentation. ABC markets its services and products to local

colleges, business owners, and individual customers. ABC leaders used their mastermind

support group to determine to change work demographics and target potential new

customers. For example, ABC leaders partnered with the local college to train students on computer programing and repair. The goal of this partnership was to prepare the next generation of computer specialists and to market ABC services and products. The owners of ABC also used the mastermind leadership training course to ally with local business and civic leaders. ABC leaders emphasize building relationships with current and potential customers by marketing their vision and mission to the local community and stakeholders. By using social media, face-to-face and social connections, ABC markets its products and services to business and civic leaders in the surrounding community. Using multilevel marketing allows ABC leaders to determine the needs and wants of customers and helps them determine customer groups and market segmentation.

Relationship management. ABC employees build customer relationships using word-of-mouth and personal relationships with members of the community. ABC owners serve in various capacities in their local church, participate in school activities, and develop social connections. ABC does not have a formal customer relations strategy, but it has a loyal following of customers due to a tight-knit business network and sports organizations where they serve in the community. The leaders of ABC continue to build customer relationships based on their service to the community and their reputation for quality and fast service.

Complaint management. The information needed to understand a consumer's complaints is valuable to ABC's brand loyalty. ABC's customer engagement process, outlined in Figure 3, provides early detection and quick response through direct and indirect contact with members, stakeholders, and clients submitting the complaint. ABC's

leaders ensure that appropriate resources and transparent communication are involved in the resolution process.

Measurement, Analysis, and Knowledge Management

Leaders select data and information, use data, and turn the data into useful information for improved performance, increased efficiency, performance measurement, productivity, and customer response (Baldrige Performance Excellence Framework, 2017). Lee et al. (2016) suggested procedures for mature small business leaders to improve performance measurement and business knowledge. The aim of performance measurement, analysis, and knowledge management is to guide small business leaders in the process to achieve key organizational objectives, anticipate and respond to rapid change or industry disruption, and implement best practices across the industry (Baldrige Performance Excellence Framework, 2017).

Measurement, analysis, and improvement of organizational performance. Measurement, analysis, and knowledge management proved to be a challenge for ABC leaders because of the size of the organization. ABC leaders use data from two primary sources to measure performance. First, ABC uses the RepairShor program to track the start and completion times for computer repairs. Second, ABC uses Google AdWords to track campaigns, missed calls, and e-mail traffic from customers. ABC leaders track billable hours using RepairShor computer-generated data and Microsoft Word calendars. The owners of ABC track short- and long-term goals during their monthly mastermind meeting with the Entreleadership group. The leadership of ABC addresses weekly goals and monthly progress during the weekly staff meeting. ABC does not have a formal

system to select comparative data and information to support fact-based decision making. However, ABC measures performance based on billable hours and customer feedback and adjusts priority based on the data. For example, ABC leaders can improve employee pay based on quarterly generated billable hours.

Comparative data. ABC's focus is on continues improvement and new learning opportunities within the IT field. ABC leaders used results to guide decision making at the ownership level, process improvement opportunities, and for future strategic goals. ABC leaders used comparative data to conduct benchmarking and analyze performance.

Customer data. ABC leaders and support staff use customer feedback from the call center, e-mail feedback, and surveys to build a more customer-focused culture and to support fact-based strategic decisions on performance and processes. ABC's support staff receives weekly engagement and monthly training to align with the company's mission to provide high-quality customer support.

Measurement agility. The leaders of ABC conduct planning, performance review, and corrective action that occur weekly. The performance reviews provide the opportunity for action plan modification and align resources to strategic goals. Building on the GST as the conceptual framework of this study, the research findings suggested that one person making all the decision is insufficient for implementing long-term growth strategies.

Performance analysis and review. ABC leaders respond to changes within the organization by using input from current technology and analyzing industry trends. During mastermind team meetings, ABC leaders review organizational performance

based on long-term growth strategies and operational goals. ABC is a family-owned business consisting of a husband and wife team with one additional full-time computer service specialist. Therefore, ABC leaders can quickly respond to changing demands on resources and adjust standard operations procedures to meet long-term strategic objectives. ABC leaders review all changes and challenges during weekly meetings and discuss the future solution in the monthly mastermind group meeting. ABC leaders use customer feedback, results from billing hours, and strategic planning to measure individual and organizational performance.

Performance improvement. The owners of ABC determine their future projects and meet their growth strategies by properly analyzing financial data, number of walk-in clients, and calls generated from Google AdWords. ABC owners set their priorities at the staff level. For example, the co-owners establish priorities and provide guidance and direction to the staff.

Future performance. Successful business leaders evaluate and analyze inputs from past performance as compared to projected performance (Baldrige Performance Excellence Framework, 2017). ABC does not have a governing board and does not need permission from higher levels of the organization to align its performance with its short- and long-term goals and objectives. To communicate performance improvement plans to the staff, ABC leaders use e-mails, face-to-face interaction, and weekly face-to-face staff meetings. ABC's leaders prioritize resources to meet long-term strategic goals based on past performance and industry changes in Information Technology advances.

Continues improvement and innovation. Business leaders identify opportunities for growth and change based on past performance, data analysis of performance goals, and benchmarks (Baldrige Performance Excellence Framework, 2017). ABC leaders communicate with vendors to ensure organizational alignment by utilizing integrated IT systems at the 3- and 6-month intervals. The IT systems include network drives, auto-generated software, Facebook, Twitter, and online resource information from the organization's website.

Information and Knowledge Management

Data and information. ABC leaders ensure quality, integrity, reliability, and validity of data by using Google AdWords. Using Google AdWords allows ABC to share information across social media platforms. ABC serves as security IT experts, which includes emergency response to programs and systems, software maintenance, and data security. ABC protects the organization data while helping customers' security data and IT needs. ABC also used social media platforms, such as Facebook, to promote its products and services. ABC employees provide computer programming classes to local colleges and business partners to ensure the system is user-friendly. The leaders of ABC safeguard the security of the business software by performing virus scans regularly and storing all data on a cloud-based, drop-box system. The leaders of ABC maintain written ledgers of all billable hours at their storefront and offsite locations.

Organizational knowledge. ABC leaders verify and ensure the quality of organizational data and information with Google AdWords. Combining weekly staff meetings, daily face-to-face interaction, and computer-generated systems provide ABC

leaders the platforms to share organizational knowledge to all employees. ABC leaders

shared information with the computer specialist during regular face-to-face interaction

and weekly staff meetings. ABC leaders provided the new hire with a written standard

operating manual and created a 2-week in-processing orientation program in 2017.

ABC leaders held open forum events to generate new ideas, customer feedback,

and technological innovation, which ABC leaders later shared on the organizational home

webpage, social media platform, mastermind meeting, and weekly staff meetings.

Sharing information and knowledge at the mastermind group meetings provides the

leaders of ABC with constructive feedback and generates new growth strategies. Using

Google AdWords and mastermind meetings helped ABC to improve the quality and

availability of organizational data to employees, staff, customers, suppliers, partners, and

collaborators.

Best practice. ABC leaders share their best practices in the organization by

posting feedback to Google AdWords, at weekly staff meetings, and during face-to-face

interactions. Due to the small number of employees, ABC leaders recognize high

performance with quarterly financial bonuses. The leaders of ABC measure best practices

by the number of repeat customers using their services and products and through billable

hours.

Organizational learning. The leaders of ABC use knowledge and resources to

improve their daily operations. For example, ABC provides feedback from customers'

comments to the staff daily. Staff can also receive immediate feedback by logging into

the Google AdWords account. The company leaders embedded learning by talking about

different ideas and implementing the ones that align with their short- and long-term strategic planning. ABC leaders used the Baldrige Performance Excellence Framework Worksheet (2017) to conduct a holistic assessment of the organization. Ongoing professional training in knowledge management and sharing best practices might improve ABC leaders' understanding of program assessment and long-term growth strategies.

Results Triad: Workforce, Operations, and Results

Leaders that create a high-performance work environment can engage the workforce to adapt to change and accomplish organizational goals (Baldrige Performance Excellence Framework, 2017). Having the proper number of workers that contribute to the right skills set is critical to the overall success of the business (Greenspan & Wooldridge, 2018). Leaders can project future needs to implement appropriate professional training, recruitment incentives, hiring practices, and retention strategies (Dragnic, 2014).

Workforce

Workforce environment. Leaders of ABC encourage a positive and productive work environment established on faith-based principles and standards. In 2017, ABC leaders implemented a new employee training guide after releasing a former employee for lack of productivity. The new employee training handbook contains clear guidance on professional conduct and work requirements. ABC leaders also conduct weekly staff meetings to assess staffing levels and workforce capacity. ABC leaders recruit and retain new employees by providing higher income potential based on job performance and productivity. The leaders of ABC are currently seeking to grow operations by securing a

second downtown storefront location. ABC leaders plan to use the same recruitment and hiring process outlined in the company handbook. New employees receive written, and verbal feedback, and ABC's senior technician provides hands-on new employee training for all computer specialists.

ABC leaders recruit new computer specialists through job fairs, help-wanted postings in local colleges, and online social media outlets. The leaders of ABC require potential candidates to complete an application to report their education, experience, and skill levels for the job. The form includes questions on training, work experience, professional references, and computer certifications. ABC leaders manage the workforce by setting the example for personal and professional conduct on and off the job site. The founders of ABC expect their workforce to operate with honesty, integrity, and professionalism while conducting business in the community. ABC leaders use weekly meetings to provide workforce feedback and to reinforce performance expectations. The leaders meet monthly to discuss and review the organizational core competencies that align with short- and long-term strategic growth strategies.

Workforce climate. The leaders at ABC appeared to have a positive and friendly working atmosphere and were open to new ideas from the employees. The leaders of ABC encouraged open dialogue about day-to-day operations and innovation. The new computer specialist appeared open to training and leadership from the ABC owners. The workforce seemed focused on the success of the business and understood the mission, core values, and beliefs of the organization. The leaders of ABC support their workforce by providing paid leave, health, and dental care insurance and performance bonuses.

ABC is a computer IT company, and the workforce is at low risk for workplace hazards, falls, and environmental concerns. Nevertheless, ABC provides a physically inclusive workplace for both employees and customers to enter the facility.

Workforce engagement. The leaders of ABC encourage a supportive, collaborative, and open communication working environment to enhance growth and productivity. Understanding the characteristics of high-performance work environments is key to understanding and building an engaged workforce (Jardon, 2018). ABC has an engaged and technically skilled workforce. The leaders of ABC use weekly meetings to track and discuss workforce engagement and share performance outcomes with employees. The leaders of ABC empower computer specialists to set appointments and to make decisions on products and services for clients. ABC leaders assess workforce productivity and engagement using billable-hours worksheets and assess customer grievances via computer-generated feedback on the company website. ABC leaders reward their computer technicians with pay incentives based on the previous quarter's billing hours. ABC leaders also recognize the work engagement and performance effort of the workforce during daily interaction, weekly face-to-face meetings, and monthly staff meetings (see Figure 4).
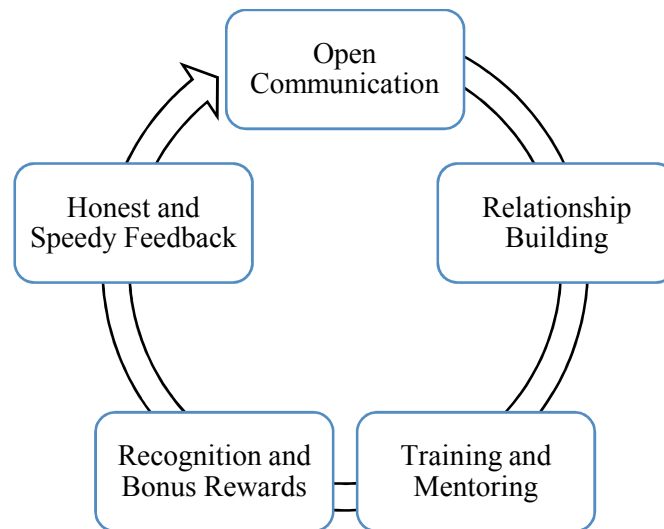
Figure 4. ABC's workforce engagement strategies.

Workforce and leader development. Professional development of the new computer specialist was essential to the growth strategy at ABC. The leaders of ABC ensure new employees' success by providing mentorship and on-the-job training. ABC leaders reinforce the importance of ethics and ethical business practices during the newcomers' orientation program. ABC leaders used the first two weeks of employment to train the workforce on the mission, goals, and values of the organization. The addition of the new computer specialist allowed the seasoned computer specialist to travel offsite, which resulted in more billable hours for the business. ABC leaders are grooming the new computer specialist to take a more active role as part of succession planning and leadership development for the company.

Operations

Leaders must evaluate how they and their staff identify, assess, design, and manage work processes to improve operational effectiveness to deliver customer values and to achieve long-term success (Baldrige Performance Excellence Framework, 2017).

Goals, policies, procedures, and processes used to accomplish strategic goals must align with the resources of the organization and the organization's operations plan (Greenspan & Wooldridge, 2018).

Work processes. Key work processes are critical to value creation within the business. ABC incorporates technology to assist in solving computer information problems. The primary technology driver at ABC is Ninja software, which allows technicians to monitor business systems and alerts ABC staff and the customer of potential security breaches.

Key work processes and design concepts. ABC also deploy the Ninja system to protect customer privacy during financial transactions. ABC employees use e-mail and phone calls to communicate with clients about their business system's health and imminent system failure. ABC address customers' needs after the initial service call by providing auto-generated e-mails at 3- and 6-months intervals.

Process management and improvement. ABC leaders measure end-product quality and performance by contract services, scheduled maintenance services, and call-for-services options. The leaders of ABC determine day-to-day success and process improvement by reviewing service logs and feedback from customers. The leaders of ABC can monitor daily changes and shift resources to adapt to customer and industry changes.

Process implementation. Leaders must understand how to improve processes to achieve better performance. Improving performance can provide higher quality to clients and develop financial resources for the business (see Baldrige Performance Excellence

Framework, 2017). Process implementation begins with ABC leaders identifying

challenges and solving problems immediately. ABC leaders implement processes based

on industry changes and customer feedback to ensure processes align with the long-term

growth strategy of the business.

Support process. ABC leaders manage key work processes by eliminating waste,

increasing staff productivity, and allowing staff members to schedule remote assignments

in conjunction with their availability and skills. The efficient and effective process

contributes to the overall financial soundness of the company and allows ABC leaders to

offer additional IT training and certification. ABC leaders seek to support staff and

improve work processes to provide better performance to customers.

Product and process improvement. ABC leaders seek to improve their work

processes by implementing interactive software that tracks the number of service calls

and generates automatic feedback requests three days after the service. ABC leaders

systematically analyze the work system using customer feedback and ensure processes

align with the vision, resources required to perform the task correctly, and all associated

costs to the business.

Supply-chain management. The leaders of ABC ensure that suppliers meet the

needs of day-to-day operations. ABC leaders provide two-way communication to

suppliers and maintain a positive working relationship that results in mutual benefit. ABC

leaders use ESET for antivirus protection and IBackup to protect their computer software.

ABC has an affiliation with a major telecommunication company as the company's main

internet provider. ABC computer technicians can remotely log into their clients' system to monitor potential software breaches.

ABC computer technicians use a variety of hardware products such as servers, switches, parts, and other hardware-based on customer needs and product preference. ABC leaders rely on more than one supplier of software equipment, which allows them to bargain on pricing and shipping. When ABC leaders encounter poor services from suppliers, they stop working with the company. ABC leaders also screen international suppliers to ensure high-quality software. Therefore, ABC leaders primarily rely on local or domestic software suppliers.

Innovation management. ABC technicians implement new technologies, software, and install new malware to capitalize on innovations within the IT industry. ABC leaders focus on computer technology trends that affect systems and how clients use software to promote, protect, and sustain the business. For example, ABC technicians implemented the new remote monitoring Ninja software to alert clients of potential dangers to their systems. As a computer and software company, ABC considers innovation as a primary driver in the industry. ABC leaders understand how quickly software changes across an enterprise. ABC leaders include innovation management as part of the hiring process to determine how new computer technicians view innovation disruption and change. The leaders for ABC consider the financial obligation when deciding on software upgrades and purchases necessary to maintain high-quality products to meet consumer demands.

Operational effectiveness. Leaders must ensure efficient operations to have a safe work environment to deliver high-quality service to clients. For leaders, it is critical to have knowledge of operations management and understand the crucial elements of business operations to improve effectiveness and daily activities (see Baldrige Performance Excellence Framework, 2017). ABC leaders maximized the performance of each employee by combining employee training and development with investment in computer technology.

Process efficiency and effectiveness. According to ABC leaders, 75% of ABC costs cover staff salary, and 25% support the operational budget for the downtown storefront and equipment. ABC leaders attempt to control costs by purchasing high-quality, low-price technology products. The owners of ABC conduct a monthly financial review during staff meetings and discuss cost-saving options with the financial peace mastermind group. ABC leaders try to control operational costs by reducing overhead costs, monitoring heating and cooling costs in the storefront, and reviewing software product costs annually using financial spreadsheets and budgets. The owners of ABC balance the need for cost control with the needs of the customers by remotely monitoring software and therefore reducing the cost associated with traveling. ABC technicians prevent service errors and rework by running computer tests on all systems before they leave the store or by checking the offsite systems remotely. ABC leaders balance the cost of repair, replacement, and purchase by providing repair warranties on all products and services. ABC leaders also reduce overhead costs by using refurbished monitors and keyboards and by receiving credit for recycling equipment.

Management of information system. ABC leaders ensured the reliability of information systems by using a firewall and antivirus software. The owners of ABC equipped their storefront property with six video cameras monitored by Armor Security Systems. ABC technicians maintain cybersecurity by using ESET and Sonic Wall Firewalls, limiting access to computer systems and practicing proper operations security procedures. For example, ABC computer technicians change passwords regularly and instruct clients to follow similar security processes. ABC technicians prevent cyberattacks from systems by providing backup and recovery software. ABC uses cloud storage and installs IBackUP software for both the customer and the business systems.

Safety and emergency preparedness. ABC leaders provide a safe operating environment for employees and customers. ABC operates from a storefront in the local downtown area and remotely via the Internet. ABC employs a cleaning team to perform weekly upkeep and garbage removal. The leaders of ABC ensure the safety of customers entering the storefront by carpeting the entranceway to prevent slips and falls during heavy snow days. ABC leaders promote a healthy workplace by encouraging employees to take 15-minutes breaks in the morning and the afternoon. The owners of ABC also provide ergonomic chairs and adjustable sit-to-stand work desks to reduce neck and back strain. Although ABC owners lack a formal business disaster or emergency plan, in case of limited power, they can provide remote computer assistance to customers.

Collection, Analysis, and Preparation of Results

Product and Process Results

ABC is a for-profit family-owned mature small Information Technology (IT) business operating in the midwestern United States for 13 years. The leaders of ABC opened the business to serve the local community. In 2016, the leaders of ABC moved the family-owned business from their home location to a storefront location. The leaders of ABC are seeking to add additional store locations as part of their long-term growth strategy.

ABC works to create change in the world through relentless advocacy and exceptional professional development. The leaders of ABC remain active in the local community by volunteering as basketball coaches and leadership positions in the chamber of commerce. ABC owners contribute to the community by co-sponsoring monthly small business leadership training using Dave Ramsey's peach university financial classes. The leaders of ABC believe the more competent a mature small business owner becomes; the more effective they perform in their role as chief strategist.

Customer Results

The basis of the success of ABC is the employees and leaders accomplishing the tasks outlined in the mission and vision statement of the company. The basis of ABC services and process results is the ethical foundation and spiritual principles of the owners. ABC primarily serves the security needs of information systems in local businesses and education institutions. ABC leaders reference billable hours to evaluate key performance measures established at the beginning of the calendar year. The owners

of ABC monitor feedback from customers and follow industry trends to develop future growth strategies. The most important growth step at the company was renting a downtown store to expand product sales and increase the customer base. ABC continues to affect the local community by reducing unemployment and increasing tax revenue.

Workforce Results

ABC leaders use customer feedback and billable hours worksheets to help integrate various platforms such as Ninja software and Google AdWords to ensure effective work processes and open communication with customers. ABC leaders implemented an auto-generated e-mail software that contacts customers at 3 and 6-month intervals to access services and promote customer loyalty. ABC leaders and staff continuously seek ways to eliminate repeated work orders and improve reporting time to service calls. ABC leaders implemented remote access capabilities to customers that will allow computer specialists to enter client computer systems remotely. ABC leaders' focus on long-term growth was evident in their hiring of a new computer service technician. In 2017, ABC owners achieved one long-term growth goal by renting a downtown storefront to sell products and to service computers.

Safety and emergency preparedness. ABC does not have any formal safety or emergency preparedness plan, and the company would benefit from developing safety training courses that might include an active shooter response, first aid, CPR fire and evacuation rally points, fire extinguisher use, and natural disaster protocol. However, ABC does meet the local, state, and federal health and safety standards for business

owners in the State of Minnesota, which includes handicap accessibility, fire sprinklers, and snow removal.

Supply chain management results. ABC leaders have worked well with local business and education institutions to build a dependable supply chain of products and services. The leaders of ABC ensure high-quality computer parts and equipment by using a variety of local and national companies. ABC uses limited overseas products due to the low quality and the high frequency of counterfeit items. ABC maintains a business line of credit with local department stores. The leaders of ABC use social media platforms to ensure the purchase of high-quality products at the lowest cost. ABC passes the supply-chain savings to customers in the form of rebates and lower repair costs.

Customer Results

Leaders need to measure customer-focused performance results to understand client satisfaction with the product and build brand loyalty (see Baldrige Performance Excellence Framework, 2017). Relevant data for building relationships could include customer satisfaction, access to service, and timely feedback to client problems. Leaders of ABC need to emphasize brand loyalty, process improvement, and quick reaction to customer complaints.

Customer satisfaction. The leaders of ABC gain an understanding of their customers through computer-generated feedback systems, an active social media presence, and face-to-face interactive quarterly open-house events. ABC staff use social platforms such as Facebook, a company webpage, staff meetings, and mastermind financial peace leadership tools to gain feedback and to monitor both positive and

negative customer comments. ABC leaders implemented new software that generates auto-generated messages to customers to obtain feedback on services at 3 and 6-month intervals.

Customer engagement. ABC leaders benefit from capturing and electronically storing information received from customers through Google AdWords. ABC co-owner volunteered as a basketball coach at the local high school and youth center. Therefore, the co-owner sought both business and social opportunities to engage current and recruit potential customers. The feedback from customers is critical to the continued success and growth of the business. ABC leaders use their expertise in IT to install software tools to improve customer engagement and communication channels.

Workforce Results

Leaders may review outcomes related to workforce safety, absenteeism, hiring, and recruiting efforts. Results reported for indicators of workforce capacity and capability might include staffing levels across organizational units and certification to meet professional development requirements (Baldrige Excellence Performance Framework, 2017). ABC leaders developed a culture of trust by openly sharing workforce performance data and insight for future growth strategies with employees.

Workforce capability and capacity results. ABC is a family-owned mature small business operating in the midwestern United States. ABC's organizational work structure consists of two computer technicians and one administrator/marketing professional. The lead computer technician is also co-owner of the company and the administrator/marketing professional is the other co-owner. The co-owners of ABC

earned college degrees, and the newly hired computer technician has computer programming certification. The specialized computer and marketing training of ABC leaders reinforced the structure of the workforce.

Workforce climate results. The workforce climate at ABC is consistent with the mission of operating with integrity, skill, and efficiency. ABC leaders continue to monitor the organizational environment and attempt to create a positive working climate. ABC leaders encourage open dialogue on professional issues and mentor the junior employee on social and personal development. The staff of ABC works nearby, which allows immediate feedback on work-related matters or concerns. The leaders of ABC encourage employees to boost their customer engagement and work together to grow the business.

Workforce engagement results. ABC leaders demonstrated their willingness to engage with their employee by recognizing family birthdays and by providing opportunities for social engagement. ABC leaders also reinforced the importance of teamwork and commitment to the growth and expansion of the business. Although workforce engagement is challenging to define, ABC leaders might benefit from attending online or face-to-face training on employee development/engagement.

Workforce and leader development results. ABC leaders seek to develop the workforce by providing on-the-job training and career development opportunities. According to ABC leaders, they provide professional and personal development counseling to their employees. Although ABC does not have a formal leadership development policy, they continue to improve their management and leadership skills by

attending monthly mastermind leader group meetings. ABC would benefit from developing a formal succession plan that includes identifying and training the next generation of leaders to grow the organization.

Leadership and Governance Results

Small business leaders measure appropriate internal quality indicators, field performance of products, service errors, timely appointments, and response times to customer complaints (see Baldrige Performance Excellence Framework, 2017). Small business leaders use measures to track key processes for operational improvement (SBA 2017). All areas of organizational and operational performance should be evaluated by instruments that are relevant to the strategic plans of the organization.

Senior leadership communication and engagement results. ABC does not have a formal process in place to measure and track senior leaders' communication and engagement efforts. ABC leaders offer monthly open-house sessions at the storefront to engage and inform the community on business and civic trends. ABC leaders demonstrate social responsibility by volunteering their time with youth sports and public activities and by hosting a semiannual recycling event where local community members can drop off broken electronic devices for free and receive a discount coupon for new equipment or services. ABC leaders continue to seek information from mentors and other small business operators to improve services and grow the business.

Governance accountability results. As a family-owned and operated sole proprietorship, ABC does not have a governing board of directors. ABC is subject to local, state, and federal business laws. The owners of ABC follow state auditing and local

business zoning regulations. For governance and accountability, ABC leaders communicated information relative to legal compliance with workplace safety and Equal Employment Opportunity laws. ABC leaders and staff are transparent in all their record-keeping and standard operating procedures.

Legal and regulatory results. The owners of ABC have not experienced any legal or regulatory infraction since the start of the business. ABC leaders maintain the required level of business insurance and safety requirements, and they back up all financial records in case of an audit from local, state, or federal regulators. The owners' practice of maintaining impeccable records reflects dedication and attention to detail that will aid the company in meeting long-term growth.

Ethical behavior results. All employees of ABC are encouraged to conduct business professionally and ethically. ABC service model includes integrity, skill, and efficiency. The owners of ABC have not experienced any ethical behavior problems within the organization. ABC's business plan is consistent with ABC leaders' biblical beliefs of honesty, integrity, and hard work. ABC might benefit from creating a workforce policy that outlines ethical behavior and conduct in the workplace. ABC's lack of an official policy might place the company at risk for unethical behavior in the future.

Societal well-being and community support results. ABC leaders make a significant societal impact by providing mobile communication service to local businesses, dentists, chiropractors, lawyers, machine shops, restaurants, and education institutions. ABC leaders donate financial resources and volunteer to coach local youth sports teams. The leaders of ABC serve on local civic and social boards and are active in

their local church. The leaders also encourage the workforce to volunteer and serve the local community. ABC leaders host monthly open-house events at their storefront to discuss business trends and social activities. ABC leaders exemplify corporate, social, and environmental responsibility to their community.

Achievement of organizational strategy and action plans results. The owners of ABC use customer experience, feedback, and billable hours to determine organizational success. ABC leaders use weekly and monthly internal staff meetings to pinpoint customer needs and appropriately direct resources. The focus of ABC's business plan, established in July 2017, is the previous achievement, which helped create long-term growth strategies. The accomplishment of ABC's growth plans was contingent on meeting short and long-term objectives. For example, expanding to the downtown storefront increased billable hours and allowed customers to drop off and pick up computers at a convenient location adjacent to shopping and restaurants. ABC might benefit from creating and implementing a tool to measure and project leadership performance.

Financial and Market Results

Leaders should use financial results to measure the liquidity, debt to equity ratio, days cash on hand, and cash flow of the business (see Baldrige Performance Excellence Framework, 2017)**.** Leaders of ABC operate their family-owned business with limited financial support from major commercial banking or credit debt. In 2016, leaders of ABC used the company's line of credit to rent a downtown storefront location.

Financial performance results. The leaders of ABC focus on financial management, including setting weekly, monthly, and annual financial budgets. ABC's daily operational budget includes staff salaries, marketing expenses, and computer parts. ABC owners charge customers $125 per hour, with a $25.00 deduction for contract clients. ABC offers remote support for $115 per hour during normal business hours. ABC offer carry-in repair services for $145 plus parts and $45 for diagnostic and data recovery. ABC owners charge an additional $185 for successful data recovery and restoration of the system. ABC also provides in-home after-hours services for $185 per hour.

Marketplace performance. In 2017, ABC generated $183,000 in revenue and reported assets of $46,600, liabilities of $27,500, and a net business worth of $19,100. The financial goal of ABC leaders is to increase revenue by 50% over the next 5 years by opening a second downtown storefront and hiring 2 new computer technicians. ABC leaders conducted a market share analysis to determine the company's position and market share growth. The leaders of ABC identified three companies operating within the surrounding areas: two locally owned and one national brand in computer repair services. ABC can increase customer loyalty by providing high-quality drop-off, in-home, and remote services at the lowest price. The owners of ABC plan to increase marketplace performance by focusing on socially responsible activities and by continuing to participate in social, religious, and civic organizations (see Figure 5).
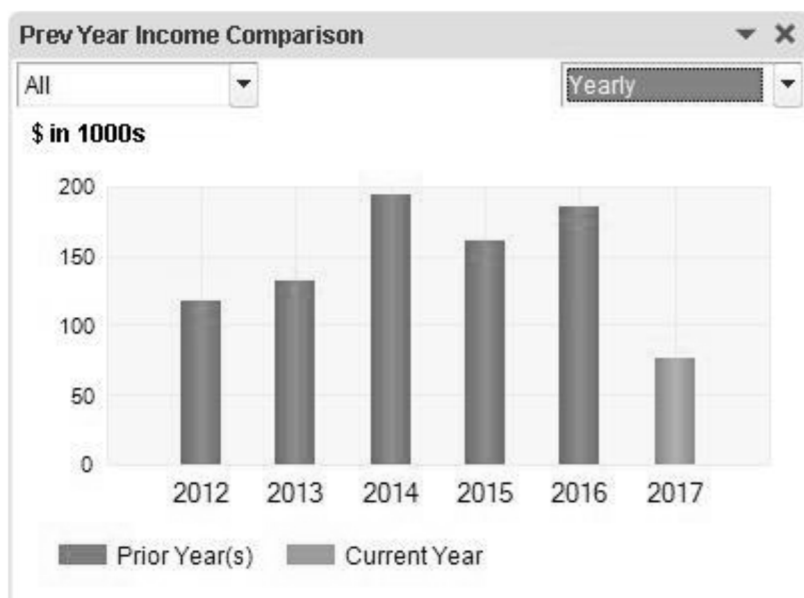
Figure 5. ABC's income 2012–2017.

Key Themes

Process strengths. Process strengths were a critical factor for ABC to grow beyond their current capacity. ABC leaders had high engagement with the workforce and provided steady leadership and technical guidance to the staff. The leaders of ABC sought to improve workplace processes by implementing computer software that provides feedback from workers and customers. ABC leaders conducted informal analysis to understand their competitors and to determine market share position within the local community. For 12 years, ABC owners sustained the business by using social and civic connections, integrity, and spiritual beliefs to guide their decisions. In 2017, ABC leaders took an unprecedented step in their organization's history to grow the business by renting a downtown storefront location. Thematic analysis was the method used in exploring process strengths for ABC. I conducted semistructured interviews, reviewed study participants' responses, and the organizational business plan, and found the leaders of

ABC were actively engaged with the staff, local community, and civic activities. My analysis of the organizational documents and participant's responses to the interview questions showed that ABC owners sought a long-term growth strategy. I concluded that the processes used by ABC leaders showed continued financial improvement over the previous 5 years.

Process opportunities. There are several opportunities for ABC leaders to consider. Through a lengthy 40-week analysis, ABC leaders determined a need to create standard operating procedures manuals and to implement short and long-term goals such as growth initiatives, hiring and recruitment policies, and succession planning for the next generation of owners. As a mature, small, family-owned business, one owner makes final decisions. In the absence of a board of directors or governing body, the growth of the business depends on one person. Participants' responses to interview questions 1, 2, 3, and 4 and review of public data revealed the need for ABC owners to invest in training new leaders in supply-chain management, finance, and business management. ABC also mentioned the emotional conflict between growth and the demands that come with growth, such as loss of family time, vacations, and scheduling conflicts. The leadership of ABC could address the need for a standard operating process and create a succession plan to sustain future growth and productivity. Analysis of the data from the literature, interviews, and relevant company documents such as written response to the Baldridge excellence performance worksheet, and ABC's business plan revealed that ABC did not have a standard process for hiring new employees. However, during the Walden

Consulting Capstone, the owners of ABC implemented new hiring procedures, including workplace orientation and published material.

Results strengths. ABC owners' business strengths are (a) the technical skills of the computer technicians, (b) strong leadership and mentorship, and (c) 12 years of industry experience. ABC has the flexibility to change course, adapt to industry trends, and make decisions without the approval of a governing body. ABC leaders' active engagement within the community contributes to product marketing, visibility, and business recognition. According to ABC owners, revenue increased by 20% since the economic downturn of 2009, and the leaders continue to push for additional market share in the computer repair sector in the community.

ABC's website and auto-generated feedback software provide instant feedback from customers and allow ABC leaders to adjust to rapid change and technology disruption. The willingness of ABC's leadership to attend monthly mastermind financial and management training was instrumental in the company moving toward long-term growth strategies. Based on the results from the Baldrige Performance Excellence Framework (2017), semistructured interviews, and business plan, I concluded that ABC owners provided strong leadership in the area of personal readiness and professional conduct. Building on the GST as the conceptual framework of this study, I discovered clear and meaningful communication between staff and leaders contributed to the success of the organization. Another critical finding noted the limitation of one person making all the decisions on long-term growth strategy implementation. I also concluded that leaders

of small family-owned businesses might include training the next generation of family members to take over and sustain the business.

Results opportunities. ABC leaders and staff provide high-quality computer repair via drop-off, in-home, and remote services. ABC owners continued to earn more revenue over the past decade, allowing expansion to a downtown storefront. ABC's active participation in both social and civic activities provided additional exposure to potential clients and the business community. During the telephone interview, Participants 1 and 2 noted the importance of hard work, faith, and confidence in self as key elements of long-term growth.

The leaders of ABC must improve measurement and implementation of employees' opportunities for engagement and leadership development. I suggest that ABC leaders continue working with the financial mastermind group, continue the monthly open-house discussion forum, and continue their social and civic participation. ABC might benefit from conducting a needs assessment in the community to determine gaps in service. ABC's annual report identified the strengths and weaknesses of local competitors.

The leaders of ABC might benefit from creating and conducting a staff survey to provide feedback on their leadership effectiveness, workplace climate, and specific needs of the workforce. ABC leaders might also implement specific rules and guidelines on personal appearance, customer engagement, and communication requirements. I used methodological triangulation using ABC's business plan and interview responses to determine that one person making all the decisions is insufficient for implementing long-

term growth strategies. My analysis of the Baldrige Performance Excellence Framework (2017), organization's business plan, and participants' responses to the interview questions showed that open and honest communication between owners was instrumental in implementing long-term strategies for growing a mature small IT business beyond current capacity.

Project Summary

The IT business sector is a large and growing body of relatively small organizations (Beaton & Hwang, 2017), and 1.4 million mature small businesses operate in all industries in the United States (Stecker, 2014). Small firms make a significant contribution to the social and economic well-being of regions and countries by creating new jobs and increasing tax revenue (Deligianni, Voudoris, & Lioukas, 2015). Though the growth of mature small IT businesses is necessary for long-term productivity, profitability, and sustainability, some mature small businesses do not grow as they age (York, 2017). When small businesses fail to grow or go out of business, the cessation of the service they provide to the community forces customers to seek services at larger firms and often at higher prices. Another problem associated with failure to grow is a higher unemployment rate for the local community (York, 2017).

Senior leaders operating mature small businesses might associate slow growth with poor marketing plans, informal control structures, and lack of vision from managers (Lu, 2015). The growth of small mature IT companies is critical to the development and growth of the local community (Greenspan & Wooldridge, 2018). To increase growth,

small business leaders might need to create and implement strategies for long-term growth and sustainability.

In this case study, I explored strategies to grow beyond ABC's current capacity and analyzed data collected from leaders of a mature small IT business in the midwestern United States. Leaders of mature small IT businesses can use the data I have assembled in this single case study to develop and implement effective strategies to grow their businesses beyond their current capacities. Growth is the most critical aspect of small business productivity, profitability, and sustainability (Bello & Ivanov, 2014). Each participant in this study provided valuable insight into short- and long-term growth strategies.

The co-owners of the business, which account for 100% of the participants, had similar cultures with the business that tied to the methodological triangulation of one another. The methodological triangulation showed that long-term growth strategy was part of the overall long-term plan for the business, but the owners differed on the timeline to pursue the goal. Based on methodological triangulation using ABC's business plan and interview responses, I determined that the leaders of ABC did not agree on specific growth timelines and lacked plans to address sustainment in case of the incapacitation or death of both owners. Therefore, if something happens to the current owners, the leadership had not identified or trained the next generation of family members to carry on the family business. A review of ABC's business plan supported the findings from the interviews and literature. In addition, I conducted member checking with participants by

giving participants my interpretations of their answers to interview questions and asking them to verify the accuracy of these interpretations.

The findings of this qualitative single case study may be significant to leaders of mature small businesses, especially owners and leaders of mature small IT companies. Small businesses contribute to the improvement of social and economic conditions and account for 62% of net jobs in the United States (SBA, 2017). The results of this study may contribute new knowledge for leaders of mature small businesses on growth and strategic planning. The results from the Baldrige Performance Excellence Framework (2017) provided the leaders of ABC significant feedback in organizational profiling, leadership, customer engagement, measurement, analysis and knowledge management, workforce development, operations, and strategic planning.

Mature small business leaders reviewing the data in this study might gain valuable insight into a comprehensive approach to developing and implementing growth strategies for mature small IT companies. Mature small business leaders might also learn staff engagement techniques and succession planning. I found a need to understand the influence of personal beliefs, professional business experience, and individual attitudes of leaders to determine growth strategies for mature small businesses. Leaders using the results of this study to implement growth strategies might improve their organization's profitability, reduce unemployment, and increase local tax revenue.

Implications for Social Change

An implication for social change includes the potential to provide leaders of mature small IT businesses with growth strategies to achieve beyond their current

capacity. ABC contributes to increased tax revenue and lower unemployment rates in the community. The growth of small businesses beyond the first year is critical to the sustainability of the companies (Morgan & Sisak, 2016). In 2015, small businesses accounted for 97.6% of firms exporting goods and 32.9% of the known export value (SBA, 2017). Most start-up businesses fail with the first 5 years, which results in reduced tax revenue (Decker et al., 2014).

The growth strategies identified in this study might assist leaders of mature small businesses in developing and implementing short- and long-term goals to grow their company beyond their current capacity. The findings of this qualitative single case study may also influence the leaders of mature small businesses to seek growth opportunities beyond their comfort zone, thereby providing job growth and increased contributions to local tax revenue.

Contribution and Recommendations

I presented several key elements to support the need for mature small business leaders to implement growth strategies beyond the current capacities of their businesses. This qualitative single case study provided the opportunity for ABC to maximize its business experience, share lessons, and create a succession plan for the next generation of leaders. ABC is a family owned, mature, small business operating in the midwestern United States, and the future of the business will depend on current leadership's ability to prepare family members for the role of ownership and leadership. An effective growth strategy is critical to the growth and sustainability of this family-owned business (Pinasti & Adawiyah, 2016). Despite the lack of any formal growth strategy, ABC leaders were

effective in applying critical processes and procedures. ABC staff used social media platforms and social connections to market and promote their services. The following are recommendations for leadership action. ABC leaders might develop standardized processes for growth strategies and share the information with staff and family members. Standardized processes are key to meeting short- and long-term growth strategies (Eggers et al., 2017).

ABC could benefit from written policies that cover standard operating procedures, leadership's long-term strategies, customer engagement, and workforce and leadership development. ABC leaders could implement an annual employee performance review and evaluation procedure. ABC leaders hold weekly and monthly staff meetings but do not annotate areas of success and needs for improvement. During each performance review and counseling session, ABC leaders should seek feedback from the staff member to determine the current workplace climate. ABC could also benefit from the results of an annual needs assessment survey to determine the professional and personal experience of the staff. ABC leaders might use the counseling sessions and needs assessment to enhance two-way communication, address irregular situations, improve accountability, and explore alignment with the organizational growth strategies.

ABC leaders could also develop a basic career path for new employees based on internal career opportunities and mobility, promotions, and specialized software training. Organizational leaders are the most critical aspect of growth strategies, and their decisions and actions affect the profitability, sustainability, and growth of their businesses (Groner, 2016). Similarly, mature small family-owned businesses tend to have

a smaller workforce and a flat structure (Keasey et al., 2015). The leaders of ABC could develop a formal system or program to ensure that younger family members have opportunities to gain knowledge, make decisions, engage suppliers, and use their abilities in various positions to prepare them in case of the death or incapacitation of the current leaders. As part of their growth strategy plan, ABC leaders might create written recruitment and retention plans to prepare the company for growth and expansion.

I recommend that ABC leaders use the data collected from the Baldrige Performance Excellence Framework (2017) to build on strengths, bolster weaknesses, take advantage of opportunities, and limit internal and external threats. Qualitative researchers conducting similar consulting case studies may benefit from conducting a multiple case study of mature small family owned IT companies. The findings, assumptions, and limitations from this consulting single case study are limited in scope, and a larger sample size might provide greater insight into the growth strategies in mature small family-owned IT businesses. I recommend researchers seeking to understand the lack of growth strategies among mature small business leaders use different conceptual frameworks. I also recommend researchers use mixed methods to gain further knowledge of the effectiveness of specific growth strategies in mature small IT businesses.

The recommendation provided to ABC might be beneficial for creating a succession and growth strategy plan. The owners of ABC might seek to engage younger family members to determine their desire to learn management and leadership skills to sustain the family business. The leaders of ABC might consider hiring managers to run the day-to-day operations, freeing time for leaders to focus on succession and growth

planning. ABC might benefit from leaders partnering with a larger organization within the community to provide security software and monitoring services.

Another recommendation for future implementation is tracking data and information on daily operations, customer data, internal performance capabilities, and continuous improvement and opportunities for innovation. Further recommendations include creating and implementing a workplace handbook that outlines the organizational standard operating procedures; describing product and process requirements; and reviewing performance outcomes, work documents, code of conduct rules, drug and alcohol policies, and customer engagement. Because ABC does not have a governing board or a board of directors for oversight, ABC would also benefit from a review of financial and business records by external auditors.

The purpose of this single case study was to identify organizational strategies to grow mature small IT businesses. As a participant in Walden University's alternative consulting capstone, I worked with ABC leaders located in the midwestern United States. I interviewed ABC's leaders as the sole sample for this study. The business was a mature, small, family-owned IT company with fewer than five employees. The company leaders had recently rented their first storefront location after 13 years of operating the business from home. The leaders used this opportunity to learn and grow their business.

I used semistructured interviews with ABC leaders as well as a review of ABC's business plan, social media websites, and competitors' websites to gain an understanding of the social and economic environment of the business. Data collected and analyzed using the Malcolm Baldrige Performance Excellence Framework (2017), interviews, and

public information resulted in the identification of four themes: process strengths, process opportunities, results strengths, and results opportunities.

During the 40-week consulting process, I provided recommendations to assist and enhance communication; leadership skills; workforce engagement; standard operating procedures; health, safety, and security measures; and recruitment and retention tools. Leadership and communication play a critical role in creating and implementing a viable growth strategy (SBA, 2017). The results of this study support the need to review various methods available to leaders of mature small businesses to create and implement organizational growth strategies. ABC provides employment opportunities, products, and services that protect business software security and participate in social connection events for the local community; therefore, it is essential that ABC leaders identify and implement long-term growth strategies.

The results from this qualitative, single case study might contribute to the improvement of the business and social practices of mature small IT businesses. The contribution to business practice includes the data and information learned from using the Malcolm Baldrige Performance Excellence Framework on a mature small business operating in the midwestern United States. The contributions to social change include increased tax revenue, lower unemployment, and the promotion of business growth in the community.

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Appendix A: Interview Questions

The semistructured interviews will consist of the following open-ended questions**:**

1. What indicators do you use to determine growth in your business?

2. What growth strategies have you used in the past?

3. How did you identify growth opportunities?

4. What performance goals did you develop to grow your mature small IT business?

5. What were the key barriers to implementing successful strategies in your mature small IT business so that it could grow beyond current capacity?

6. How did you address the key barriers to implementing the successful growth strategies for your business?

7. What additional information would you like to offer about the successful growth strategies that you have employed to grow your mature small IT business?

Appendix B: Interview Protocol

Interview Protocol

Introduction Script: Thank you for your time. Per the conversation I had with you over the phone and the e-mail I sent to you, I am a Doctor of Business Administration student in the Consulting Capstone at Walden University. The purpose of this interview is to explore organizational strategies to grow mature small informational technology businesses. Your participation is really important in this study to help understand organizational growth strategies for mature small IT business leaders. Your participation is voluntary so if I ask a question you do not want to answer, if you want to stop the interview at any time, or want to withdraw from the study at any time let me know. I will take notes during the interview and audio tape to make sure I capture exactly what you say. Once I transcribe the audio taping and notes, I will schedule time with you to review my interpretations for accuracy.

1. I will turn on the audio recording device, note the date and time.
2. I will introduce the participant to his or her pseudonym name (i.e., Participant 1, Participant 2, Participant 3, Participant 4).
3. I will begin the interview.
4. I will start with question number one and follow through to the final wrap-up question (see Appendix A).
5. I will continue with targeted follow-up questions if time permits.
6. I will end the interview process and thank the participant for his or her time.
7. I will reiterate the member checking process and confirm the contact information for the participants.
8. I will convey my contact information for follow-up questions and any concerns from the participants.
9. The interview protocol ends.