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Emerging Digital Marketing Strategies Using Mobile Instant Messaging

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This is to certify that the doctoral study by

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has been found to be complete and satisfactory in all respects,
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Walden University
2020

Abstract

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MBA, King University, 2013

BA, The Citadel, 1981

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

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Abstract

Customer engagement by commercial mobile instant messages (MIMs) is hampered by the high rate of customer irritation of receipt of the message. Increasing customer engagement is essential to marketing managers because MIMs marketing opportunities do not translate into sales unless marketers employ effective strategies for MIMs as a communication channel. Grounded in the technology acceptance model, the purpose of this qualitative multiple case study was to explore strategies marketing managers used to improve customer engagement with MIMs. The participants included 4 marketing managers from 3 organizations in the southeastern region of the United States who utilized MIMs as a marketing tool to improve customer engagement strategies. Data were collected from semistructured interviews and mobile instant messages used in marketing campaigns. Data were analyzed using thematic analysis, 3 themes emerged as build trust, engage the customer, and optimize the message value. A key recommendation is marketers should avoid the use of personal names in MIM marketing campaigns. The implications for positive social change include the potential for improved consumer engagement for community residents through increased tax revenue, higher job performance for marketing managers, and the benefit of a more informed public.

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Dedication

I dedicated this project to the loving memory of my father, Hiram Earl Bailey. Shortly after I started this project, my father died. He was a warrior, an engineer, and a pastor. He rose from extreme poverty. He strove to improve himself through education, commitment to excellence, and constant personal improvement. As a child, he taught me to be self-sufficient. As a man, he taught me that my success is possible because I stand on the shoulders of those who came before me. My inheritance from my father was his passion for knowledge. To my children, Courtney, Robin, and Drew, and my grandchildren yet unborn: Stand on my shoulders and see the horizons that I can only imagine!

Acknowledgments

This journey of seven years was never a lonely one. Dr. Randall Blevins, Dean Emeritus of King University, set my feet on this path. Randall encouraged me to get my masters and later my doctorate. Thank you for the lunches and telephone calls. Dr. Timothy Malone, my chair, kept me focused upon the goal and would reach out and nudge me when I would disappear. Dr. Theresa Neal, thank you for using your time to push me to the next level. Dr. David Blum, thank you for your attention to detail and exacting standards. You improved my study.

To Courtney, Robin, and Drew: Thank you for planting the idea of your father becoming a college professor. I still cannot answer your question of why it took me so long to understand what the three of you knew all along. And last but most importantly, to Mary, my best friend, and beloved wife, thank you! Mary never wavered in her support of me and this project. I worked on this project, but Mary sacrificed for it. She gave up vacations, weekends, and evenings for me to study, research, read, write, and rewrite. She listened. She encouraged. But most importantly, she never lost faith in me. 'Thank you' is insufficient to express the depth of my gratitude and love, but words are all I have: Thank you!

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Section 1: Foundation of the Study

Mobile users in the United States sent more than 2,000,000,000,000 mobile instant messages (MIMs) in 2018 (CTIA, 2019). MIMs technology enables marketers to promote goods and services; send announcements and reminders; and advance ideas directly to consumers (Domek et al., 2016). This direct and immediate access to consumers presents challenges for marketers. Poorly executed plans annoy customers, damage brands, and, in extreme cases, result in legal actions by customers (*Phillips v. Mozes Inc. et al.*, 2017). MIMs is an effective advertising medium to provide tailored messages to customers at a precise time and place when advertisements will have maximum value for customers (Uddin, Kalam, Uddin, & Sahiduj Jaman, 2019).

Background of the Problem

A smartphone is a device with both mobile telephone and personal computer capabilities. Smartphone technology enables consumers to make telephone or video calls, search the Internet, engage in social media, manage email correspondence, take photographs, film videos, watch television, listen to music, and manage financial assets, all from a single device (Bakr & Tolba, 2016). This functionality is not bound to any particular manufacture of smartphones, such as Apple, Google, LG, or Samsung (Smith, Rainie, McGeeney, Duggan, & Keeter, 2015). In the United States, 77% of all mobile telephone users own a smartphone (CTIA, 2018). This ubiquity provides marketers with significant opportunities to communicate quickly and directly with their consumers.

The availability of individuals using smartphones to advertisers is exceptionally high among Millennials; individuals born between 1980 and 2000 (McDonald, 2015). In a survey of 1031 Millennials, Zogby Analytics (2014) found that 87% of Millennials report their smartphones are by their side day and night. This unexpected symbiotic relationship of a smartphone and human interaction provides marketers with unprecedented levels of access to consumers. This access to consumers, however, is not without challenges for marketers. It is critical for marketers to understand and comply with legal restrictions placed on mobile marketing. MIMs marketing opportunities do not translate into sales unless marketers employ effective strategies for MIMs as a communication channel (Bakr & Tolba, 2016).

Problem Statement

The high rate of customer irritation at commercial MIMs is an indicator that marketing managers may have poorly constructed the message or the marketing campaign (Salem, 2016). Customer attitudes toward MIMs advertising were unfavorable, with 64.5% of respondents having a negative perception of MIMs advertisements (Aydin & Karamehmet, 2017). The general business problem was marketing managers are not overcoming their consumers’ resistance to engage in MIMs marketing campaigns. The specific business problem was some marketing managers lack strategies to improve customer engagement using MIMs.

Purpose Statement

The purpose of this qualitative multiple case study was to explore strategies marketing managers use to improve customer engagement using MIMs. The target population for this study was marketing managers utilizing MIMs as a marketing tool in the southeastern region of the United States. The implications for positive social change included the improved engagement of consumers to contribute to increased sales, less litigation, and rapid dissemination of information. The benefits of this improved engagement of consumers accrue to local communities through increased tax revenue, higher job performance for marketing managers, and a public benefit of a more informed public.

Nature of the Study

After careful consideration of the quantitative, qualitative, and mixed methods methodologies, I selected the qualitative methodology for this study. Researchers use the quantitative methodology to focus on quantifiable variables by statistically measuring the variables in real-world environments with an emphasis on precision and accuracy (McCusker & Gunaydin, 2015). Using qualitative studies enable researchers to explore nonquantifiable subjects in context and capture the essence of situations, subjective opinions, beliefs, experiences, attitudes, and actions (Flick, 2015; Percy, Kostere, & Kostere, 2015). Mixed methods researchers integrate qualitative and quantitative aspects in the same study (Yin, 2018).

The qualitative designs that I considered for this study were ethnography, phenomenology, and case study. An ethnographic design is appropriate for studying intact cultural groups (Percy et al., 2015). The target population for this study was not a cultural group; therefore, the ethnographic design was inappropriate for this study. Researchers use the phenomenological design to develop conclusions based on real-life perspectives, feelings, assigned meanings to a phenomenon (Cypress, 2017). A study based on participants' real-life perspectives, feelings, assigned meanings to a phenomenon would not have allowed me to address the research question. The case study is the study design is best suited to investigate a phenomenon in-depth within its real-life context (Yin, 2018). A case study has a defined time frame and bounded by place (Yin, 2018). I used the case study design to explore a phenomenon in a defined time frame and bounded by place.

Research Question

The central research question for this study was: What strategies do marketing managers use to improve customer engagement using MIM?

Interview Questions

The interview questions for this study were:

1. What MIMs strategies do you use to increase customer trust?
2. What MIMs strategies do you use to reduce customers' perceptions of risk associated with opening mobile messages?

3. What MIMs strategies do you use to maximize customers' perceptions of the usefulness of mobile messages?
4. What MIMs strategies do you use to maximize the perceived ease-of-use in MIMs?
5. What MIMs strategies do you use to motivate consumers to open mobile messages?
6. What MIMs strategies do you use to increase the perceived value of mobile messages?
7. What are the barriers to implementing MIMs strategies?
8. What other questions should I ask you about commercial MIMs?

Conceptual Framework

Davis (1989) proposed the technology acceptance model (TAM), which researchers can use to explain the adoption of a specific technology or device by users to accomplish a task. TAM has four basic elements, including behavioral intent, user attitude, perceived usefulness, and perceived ease-of-use (Davis, 1989). Ingham, Cadieux, and Berrada (2015) extended TAM to include trust, risk, social influence, and entertainment. I chose the Ingham et al. extension of TAM, also referred to as iTAM, as the conceptual framework for this study.

Applying iTAM to MIMs provided an opportunity to include the evaluation of emotional or nonutilitarian variables. Customer emotional responses to an advertisement is a measure of marketing effectiveness (Magids, Zorfas, & Leemon, 2015). iTAM includes the traditional TAM variables of perceived ease-of-use and perceived usefulness, plus trust, enjoyment, social influence, and risk as variables associated with a decision to use a technology (Ingham et al., 2015). Khajehzadeh, Oppewal, and Tojib (2014) supported the decision to include nonutilitarian variables in the evaluation of marketing strategies. Khajehzadeh et al. determined consumer motivations for purchasing change depending upon the purpose of the shopper. Khajehzadeh et al. noted customers respond differently to MIMs advertisements depending upon their purpose for shopping. The inclusion of nonutilitarian variables in iTAM acknowledges the impact of consumers' motives and emotions on their decision-making processes (Ha & Im, 2016). Ingham et al. (2015) extended the TAM model to account for consumer motives and emotions when evaluating the effectiveness of MIMs. Researchers used iTAM to evaluate technologies in an e-shopping environment (Ingham et al., 2015). In this study, I used iTAM to evaluate MIMs strategies in an e-shopping environment. The iTAM model includes utilitarian elements related to engagement using computer technology and nonutilitarian variables essential to marketing practices associated with the customer decision-making process.

Operational Definitions

Behavioral intent: The likelihood a user will engage in a given behavior is known as behavioral intent (Muñoz-Leiva, Climent-Climent, & Liébana-Cabanillas, 2017).

iTAM: The technology acceptance model was developed by Davis (1989) and later extended by Ingham et al. in 2015. Included in iTAM are four additional variables beyond TAM. These additional variables are trust, enjoyment, social influence, and risk to the TAM (Ingham et al., 2015).

Perceived ease-of-use: The perception a user has of the difficulty of using a service or technology is the iTAM variable perceived ease-of-use (Davis, 1989).

Perceived usefulness: The perception the user has as to the usefulness or value of a service or technology is the iTAM variable perceived usefulness (Davis, 1989).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are facts related to the study that the researcher believes to be true but cannot verify (Cyron & Zoellick, 2018). I assumed that all participants would provide accurate, complete, and honest answers to interview questions. I also assumed the utilization of open-ended questions and active listening skills would allow the study participants to answer the interview questions completely and truthfully.

Limitations

Limitations are weaknesses or potential weaknesses of the research that are beyond the control of the researcher (Malterud, Siersma, & Guassora, 2016). A limitation of this study was the number of participants and marketing managers doing business in the southeastern United States. Limitations included the limited time to complete the study and the small number of available participants. In this study, the participant pool is small; thus, the research findings may not be generalizable to other populations.

Delimitations

Delimitations are the restrictions built into the study by the researcher and typically focus on the scope of the project (Marshall & Rossman, 2016). The delimitations of this study included demographic area, population, sample size, sampling method, and data collection method. The participants of this study were marketing managers who used MIMs in a marketing campaign in the southeastern United States. Another delimitation was the sample size of this study of three companies.

Significance of the Study

Contribution to Practice of Business

The findings of this study might be of value to businesses and specifically marketing managers. The study findings include recommendations of which MIMs strategies to use and avoid. In addition, the findings include a set of recommended processes by which the marketing managers may incorporate into their MIMs development and scheduling processes.

This study might contribute to effective business practice by identifying current strategies used by marketing managers to improve customer engagement using MIMs. Increased customer engagement often leads to increased sales (Beckers, Doorn, & Verhoef, 2017). Findings from this study might give marketers new strategies for effectively engaging customers with MIMs.

Implications for Social Change

The implications for positive social change included the potential for marketing managers to implement strategies effectively engaging consumers. This improved engagement of customers may lead to increased sales, less litigation, and rapid dissemination of information. The benefits of this improved engagement of consumers accrue companies through increased sales to local communities through increased tax revenue and higher job performance for marketing managers.

A Review of the Professional and Academic Literature

Customers utilize smartphones to improve their personal lives through fast and omnipresent connections to the world via voice, email, text messaging, and the Internet (Goswami, 2015). The evolution of smartphones into personal communication devices provides marketers with opportunities to push advertisements to users. Marketers may engage customers in discussions to build brand loyalty and convert those discussions into sales. Using smartphone technology, marketers can deliver customized, high-value messages at certain times and places to maximize the impact and effectiveness (Muk & Chung, 2015).

Marketers can adopt and adapt MIMs to build customer engagement and loyalty with the goal of consumers engaging in mobile commerce (Chowdhury, Islam, & Rana, 2016). Mobile messaging technology enables marketers to promote any good, service, or idea directly to consumers (Muk & Chung, 2015). However, this direct and immediate access to consumers presents challenges for marketers. If marketers implement marketing poorly, the consequences are a negative experience for the customer, damage to the brand, and in extreme cases, legal action against the marketer (Aslam, Batool, & Ul Haq, 2016). By contrast, well-executed mobile messaging provides a unique opportunity for companies to engage consumers, build loyalty, and empower customers (Hew, Lee, Ooi, & Lin, 2016).

Bakr and Tolba (2016) reported that the literature is replete with studies about mobile messaging advertising, but not with a consensus on the fundamentals regarding consumer attitude toward mobile advertising. Similarly, Shadkam (2017) observed inconsistencies in the effectiveness of SMS advertising. Shadkam explained the inconsistencies by the number of variables, including the methodology of delivery, message, and type of product. The lack of consensus possibly relates to the complexity of the research, the number of variables, and the relationships between those variables. This lack of consensus suggests the need for more research and perhaps new models to explain the use of the technology.

Organization of the Review

My exploration of MIMs strategies used to engage consumers via MIMs began with a literature search of both professional and academic literature. I primarily conducted a review of the literature online using the research libraries and databases of the Walden University Library, King University Library, Carson-Newman University Library, EBSCO Business Source Complete, ProQuest, SAGE, InderScience, and Emerald Insight. The searches led to professional and academic journal articles, books, dissertations, and corporate reports. I focused the searches on *short text messages*, *MIMs, mobile advertising, consumer resistance,* and *technology acceptance model*. I also maintained Google Scholar alerts based on these search criteria.

This literature review contained 92 scholarly articles. The numerical summary of the referenced works in the completed study was 137 scholarly journal articles, five corporate reports, one dissertation, and four chapters of books. Of the 153 published sources referenced works in this project, 86.6% were within the last 5 years. Ninety-one percent of these references were scholarly works. This literature review had two loci for the study, which were strategies marketers may employ when advertising and iTAM, the conceptual framework of the study. MIMs is a subset of mobile marketing in the same way as email is part of online marketing (Venkatesh, 2015).

Background of the Problem

The near-universal adoption of smartphone technology led to some unexpected behaviors by consumers. Many consumers keep their smartphones by their sides all the time (Smith et al., 2015). Consumers report their smartphones are rarely turned off and are within an arm's reach from them (Smith, Rainie, et al., 2015). Zogby Analytics (2014) surveyed Millennials about their use of technology. According to the findings of this survey, 87% of Millennials kept their smartphones by their sides (Zogby Analytics, 2014). Zogby also reports Millennials rarely separate themselves from their smartphones. The embeddedness of smartphones impacts many areas of daily life, including the responsiveness of users to text messaging (Zogby Analytics, 2014). This unexpected human behavior is now part of active research in human mobility and behavior (Sapiezynski, Stopczynski, Gatej, & Lehmann, 2015). The symbiotic omnipresent smartphone use provides marketers unprecedented anytime and anyplace access to consumers.

While this omnipresent connection to the world is an ideal connection for consumers, marketers cannot invade this private communication channel without a negative reaction from the consumer (Goswami, 2015). As with many disruptive technologies, cellular telephones and, more specifically, the mass introduction of smartphones in 2007, changed consumer behavior and the approach needed by marketers to engage consumers (Birenboim & Shoval, 2016). Specifically, MIMs have an 87% read rate in the first five minutes after the delivery of the message (Alam, Faiz, & Aftab, 2015; Domek et al., 2016; Muk & Chung, 2015).

Mobile and online advertising are the two primary forms of digital marketing. The primary difference between online marketing and mobile marketing is the pervasiveness of the smartphone in a consumer's day (Dscout, 2016). With the smartphone, the consumers carry their computers with them. Marketers have a complex environment to engage consumers with MIMs (Muk & Chung, 2015). MIMs use several types of services to deliver content to users quickly and at a very low cost. These technologies include SMS, multimedia message service (MMS), and over-the-top (OTT) applications. For this study, all of these technologies encompass the more generalized mobile messaging technologies.

Mobile Messaging Technologies

SMS was the first of MIMs technologies (Abedin, 2015). SMS is the transmission of a short message, less than 160 characters, from one mobile device to another mobile device. SMS is the most widely used smartphone application, with 97% of smartphone users using SMS at least once a week (Smith, Rainie, et al., 2015). The universality of SMS installation on smartphones makes SMS a preferred method of communication. SMS is the most prevalent form of text-based communication for young adults in the United States (Bailey, Schroeder, Whitmer, & Sims, 2016). For marketers, the adoption of SMS by consumers is an obvious choice for customer engagement.

The next commonly used mobile messaging technology in the United States is MMS. The advantages MMS has over the SMS technology is the character limit is more than 1000 characters, and users can send images, photographs, audio files, video files, and documents (Kalyoncuoglu & Faiz, 2015). MMS messages are larger and require more bandwidth on cellular networks to transmit. MMS requires at least a third-generation cellular network (3G) to function. Therefore, MMS becomes viable as a marketing tool only with the introduction of 3G technology to a region. Second-generation technology is still prevalent in underdeveloped countries, where mobile service providers often use a pay per use model to send and receive a text message (Izquierdo-Yusta, Olarte-Pascual, & Reinares-Lara, 2015).

Internationally, mobile carrier price structures of a pay per SMS and MMS message gave rise to the development of OTT applications, allowing consumers to opt for a less expensive data connection over the pay per message. SMS and MMS are native to operating systems of cellular telephones, and they pass through cellular systems. OTT messages only need connections to the internet to function. This alternate connection method allows consumers to reduce their costs of using MIMS (Gerpott, 2015). OTT applications, such as Facebook Messenger and WhatsApp, consumed internet data instead of sending billable messages through telephone carriers. As of 2018, worldwide, OTT applications transmit more than twice the number of messages compared to traditional SMS and MMS applications (Xu & Chen, 2015). OTT messaging applications are very popular with consumers outside the United States. In 2015. OTT messages exceeded SMS in many countries in Europe (Gerpott, 2015).

SMS is an older concept with limited capabilities, developed and deployed in the early nineties (Abedin, 2015). The popularity of newer OTT messages applications exploits aging SMS applications by offering improvements and new features, including integration with multiple social media platforms, advanced organizational options for message threads, and improved security through data encryption (Wu, Lu, Gong, & Gupta, 2016). OTT applications often include nonmessaging related features, including voice communications, long-video transmissions, and even live broadcast features. While these features influence the popularity of a particular OTT application, these features are beyond the scope of this research.

By volume of messages sent, OTT applications now exceed the number of SMS messages transmitted (Bailey et al., 2016). OTT applications will remain viable as long as they continue to provide benefits to consumers beyond those offered by traditional SMS and MMS applications. SMS and MMS have one advantage over OTT applications. The applications are installed natively on all smartphones worldwide (Walsh & Brinker, 2016). The simplicity and universality of SMS will ensure the viability of SMS as the MIMs communication channel for years to come.

MIMs advertising is different from more traditional types of advertising because of the near omnipresent nature of smartphones with consumers. Customer mobile devices are available to marketers using MIMs at any time or place. These messages are highly reliable for delivery (Azizi, 2014). Successful use of MIMs in commerce includes uses in banking (Peng, Zhao, & Zhu, 2016), hotel reservations (Hallsworth et al., 2015), appointment reminders (Liu & Modrek, 2016), and mobile coupons (De Silva & Yan, 2017). MIMs is a relatively simple concept of text-based communication. The simplicity of MIMs is also a strength of this communication channel. However, the simplicity of MIMs is deceptively difficult for marketers.

Marketers find mobile messaging challenging because 80% of consumers receiving commercial MIMs report they find the messages annoying (Aslam et al., 2016). Annoyance leads to consumer resistance to engagement in the marketing campaign. To develop effective strategies or techniques to engage consumers, marketers need an understanding of the causes, concerns, and mindsets of consumers that might lead to acceptance of commercial MIMs (Bakr & Tolba, 2016).

Successful commercial use of MIM grows each year, as does the consumer's willingness to accept the messages (Griffin, Williams, Wooldredge, & Miller, 2015). MIM is most effective when prompting consumers to act (Griffin et al., 2015; Sun, Wang, Yin, & Zhang, 2015). However, there are legal and behavioral limits to MIM because of the private nature of smartphones. It is essential for marketers to understand the factors contributing to a consumer’s willingness to accept MIM advertisements (Bakr & Tolba, 2016). The purpose of this study was to explore strategies and techniques marketers might use to engage customers.

Organization of Strategies

The acceptance of MIM advertising as a viable commercial channel is increasing, but marketers engaging in mobile messaging campaigns may gain an understanding of factors affecting the consumers’ attitude toward accepting or rejecting the message (Salem, 2016). Using a mind map approach to the literature, I plotted each of the major subjects of the articles, looked for patterns, and then consolidated the subjects into themes. A mind map is a practical approach to relate concepts from a large number of sources (Paine, 2015). To develop themes, I drew on the user orientation of TAM and the advertising flow model to organize the themes identified in the literature. Initially, it was necessary to use both models, but I reorganized the topics of the literature review themes and related subjects to the scheme (see Appendix A).

Advertising is a system designed to persuade consumers by communicating social, emotional, or product benefits (Fransen, Verlegh, Kirmani, & Smit, 2015).

However, consumers often resist a marketer's efforts to persuade them (Wright, 1975). Consumer criticisms of advertisements are usually specific to the strategies employed by marketers and not directed toward the advertising concept (Ducoffe, 1996). Therefore, developing a better understanding of the nature of consumer resistance to receiving mobile message advertisements is essential to the development of effective strategies.

From strategies found in my literature review, I classified the strategies into two major categories mitigating consumer resistance to mobile messaging campaigns strategies that enhance perceived trust and strategies that enhance the perceived value of the message. Strategies that enhance perceived trust contain three subcategories: trust in the source of the advertisement, the perceived risk of engaging in the marketing campaign, and the perceived control over participation in the campaign. Failure to enhance consumer trust results in consumers believing the mobile messages are intrusive (Chowdhury et al., 2016). Strategies to enhance the perceived value of the message have two subcategories enhance the monetary value of the message, enhance the informational value of the message. Failure to enhance the value of the message results in the customer undervaluing the message and disengaging from the campaign (see Appendix A).

MIM to Engage Customers

Advertisements sent as MIMs get higher consumer engagement than other traditional media, making MIM one of the most effective consumer engagement tools(Dix, Jamieson, & Shimul, 2016). MIMs have a 90% read rate within the first three minutes of the delivery of the message (Dix et al., 2016). Customer engagement extends beyond simple one-way or push communications to include both proactive and interactive customer communications (Goswami, 2015). Customer engagement enhances the relationship with customers and increases customer loyalty (Adewale & Bamidele, 2016). Customer engagement has two purposes the development of an emotional bond between the marketer, the brand or company, and the hope of a bond resulting in a long-term relationship with the customer (Goswami, 2015). Customer engagement can be of two types: provider initiatives and customer initiatives (Theingi, Phoorithewet, Wang, & Panthongprasert, 2016). MIM is an active communication channel for customer engagement.

Intrusiveness, Avoidance, Irritation, and Annoyance

Consumer criticisms of advertisements are usually specific to the strategies employed by marketers and not at the concept of advertising (Ducoffe, 1996). Marketers struggle to implement MIM to its full potential because of privacy, trust-related, and low message value issues (Dix et al., 2016). Thus, developing a better understanding of the nature of consumer resistance might help marketers develop effective strategies to engage the customer in the MIM communication channel.

Consumer irritation is a response to the customer's resistance attitude to the receipt of a MIM (Aslam et al., 2016). Ducoffe (1996) found consumer irritation at a marketing message was often related to the marketing tactics, annoying the consumer, or even insulting to the consumer. This irritation creates a negative experience for the consumer and a hindrance to engaging consumers. Irritation accounts for about 64% of the major factors negatively affecting the consumers' attitude toward mobile advertisements, thus reducing customer engagement (Rasheed, El Sahn, & El Salam, 2014). Many consumers have negative attitudes toward mobile messaging advertisements. They ignore the message and refuse to engage (Okoe & Boateng, 2015). Chowdhury et al. (2016) found irritation of the consumer by commercial MIM as a major factor affecting consumer acceptance of the message. Chowdhury et al. concluded that irritation was the only variable negatively impacting the consumer’s attitude toward the message.

Azizi (2014) found that to reduce customer avoidance, marketers should provide relevant or high-value information to the consumer. Marketers reduce the perceived intrusiveness of an advertisement by increasing the value of the message to the consumer. The reduction in consumer irritation improves the consumers’ attitude toward the advertisement and leads to higher levels of customer engagement (Chowdhury et al., 2016). A combination of low-value messages and a lack of trust of consumers increase consumer resistance engagement. According to Kim and Han (2015), irritation at receiving the message might not impact the perceived value of the advertisement. Customers might be annoyed at receiving the MIMsg, but the customer may find the value of the message significant enough to overcome the annoyance at receiving the message and avoiding negative behaviors such as avoidance and resistance.

Former U.S. President Barack Obama expressed his foreign policy strategy as, “Do not do stupid stuff” (Coletta & Carrese, 2015, p. 32). This statement reveals the duality of strategy. MIM strategies include techniques and methods to engage the customer, which can either be used or avoided. The simplicity of the Obama foreign policy strategy implies that practitioners can evaluate the situation and apply an appropriate solution. However, in practice, professionals might not have unique insights into strategy effectiveness when applied to new situations or environments. For instance, customers view unsolicited MIM advertisements as a violation of trust (Shareef, Dwivedi, & Rana, 2015). Sending unsolicited emails is an obvious marketing behavior to avoid. Customers may be happy receiving one MIM a week, but what if the marketer sends 2 or 3 or 4? Many customers perceive the higher frequency of messages as a violation of trust (Salem, 2016).

Some marketers engage in counterproductive behaviors, damaging customer engagement. To avoid this, marketers should restrain the frequency and number of marketing instant messages and avoid messages with little value to the consumer (Salem, 2016; Zedan, Salem, & Salem, 2016). Print, radio, television, and mobile telephone advertising strategies enjoy success with high-frequency impressions of an advertisement. Frequent MIM impressions increase the consumers’ irritation and resistance to engagement (Zedan et al., 2016). Avoiding these behaviors prevent the marketer from engaging in self-defeating actions and help create an effective marketing strategy.

Various researchers discussed the importance of the timing of the message (Dix et al., 2016; Salem, 2016; Zedan et al., 2016). Timing is a shorthand name for sending the message when the consumer behavior or attitude maximizes the perceived value of the message (Kalyoncuoglu & Faiz, 2015). This issue appears to be simple, send the message when the customer is most likely to engage. While conceptually simple, the implementation of effective timing is complex.

Trust concerns present another obstacle to consumer engagement. Messages sent from suspect sources provoke fears or concerns about privacy (Okoe & Boateng, 2015). A suspect source of a message is anyone sending a message, which is too good to be true, or where the sender is not known to the user. Sending unsolicited messages is illegal in the United States (Federal Trade Commission, 2009). Consumers do not trust the source of unsolicited messages(De Silva & Yan, 2017). As a result, annoyed consumers will engage in unwanted behaviors, such as deleting marketing instant messages without reading them (Shareef et al., 2015). Gaining the consumer's consent to send MIM is essential to success in the U.S. markets (De Silva & Yan, 2017).

Practitioners need to reduce the perceived intrusiveness of marketing instant messages. Aydin and Karamehmet (2017) investigated irritation related to mobile messaging, finding six antecedents of consumer irritation specific to mobile messaging with irritation having a negative impact on the consumer's attitude to engage. Muralidharan, La Ferle, and Sung (2015) conducted a two-nation study finding marketing via mobile messaging for the U.S. consumers leads to information overload, clutter, and intrusiveness. From both the studies, the only practical variable usable for practitioners is the intrusiveness of messages.

Marketers should engage in trust-building strategies to reduce consumer resistance (Adekiya & Adepoju, 2016; Dix et al., 2016). Shareef, Dwivedi, Kumar, and Kumar (2016) reported privacy concerns are an antecedent to trust and perceived intrusiveness is an antecedent to consumer irritation toward the sender and the message. Gana and Koce (2016) found consumer concerns about privacy and trust are significant hindrances to consumers engaging in mobile commerce. Perceived consumer trust is an antecedent to a consumer's willingness to engage in the marketing campaign (Adekiya & Adepoju, 2016). Dix et al. (2016) confirmed the relationship between consumer trust and the customers' willingness to accept the message.

The research on consumer irritation is not uniform. The Aslam et al. (2016) study is a contrarian study about irritation. Aslam et al. concluded consumers do not become irritated with mobile messaging advertising, but consumers refuse to participate in the campaign. Cultural differences are possible variables accounting for the contrarian finding. Aslam et al. confirmed that consumers in Europe and China are risk-averse, and U.S. consumers are not so reluctant to engage in MIM marketing.

Strategy: Personalization

Personalization is content or services tailored to consumer preferences and behavior (Nyheim, Xu, Zhang, & Mattila, 2015). Personalization builds trust with consumers and reduces irritation (Zou, Xu, Fang, & Li, 2016). Personalization is effective for persuasion when there is no significant interaction with consumers (Hew et al., 2016). In MIM marketing, personalization takes two forms: a) name-based personalization, where marketers customize messages with personal information, and b) product-services-based personalization, where marketers select products or services for consumers based upon personal information about preferences or behavior (Choi, Kwon, & Shin, 2017). Using personalization reduces recipient anxiety in receiving marketing instant messages (Hew et al., 2016).

Personalization, however, might not always be practical. For example, to personalize a message, marketers would need to collect the consumer's name and also spell it correctly. Collecting and storing such information can be time-consuming. Personalization necessitates a reduction in the size of a message (Choi et al., 2017). The SMS technology limits the message length to 164 characters. Including a consumer's name reduces the number of available characters.

Personalization also leads to consumer's privacy concerns. Fang, Luo, and Keith (2015) found personalization of messages reduces anxiety. Tseng and Teng (2016) called consumers' desire for personalization and their desire for privacy as the privacy personalization paradox. The privacy personalization paradox extends not only to name-based personalization but also to location-based personalization (Lee & Rha, 2016).

Strategy: Personalization of Content

Matching products, services, and ideas to consumers is another form of personalization. Conceptually, this form of personalization is an effective marketing strategy, but unless consumers opt into such campaigns, this type of marketing should not be used (Baig & Faiza, 2014). Unsolicited mobile messages are not only viewed as a nuisance but are highly ineffective at converting advertisements to sales. Additionally, unsolicited messages generate significant anxiety among customers (Billore & Sadh, 2015). Marketers should avoid sending unsolicited messages to avoid antagonizing customers and wasting valuable resources.

Strategy: Customer in Control

The perception of autonomy by the consumer is essential to the success of MIM campaigns. Marketers must solicit and gain explicit permission from consumers before engaging them in a mobile messaging campaign (Kalyoncuoglu & Faiz, 2015). Marketers must acquire customer consent before sending the first message (Aslam et al., 2016). The giving of consent changes the consumers' attitude toward the reception of a MIM advertisement (Tseng & Teng, 2016). Permission-based MIM campaigns have much higher engagement rates. Consumers do not perceive permission-based campaigns as intrusive or as a threat (Kalyoncuoglu & Faiz, 2015). MIM campaigns, which first obtain permission from consumers, are significantly more successful than those which do not (Shareef et al., 2016). Permission-based campaigns have a data collection advantage. Marketers might use the data collected to personalize the message to the consumer, increasing the consumer trust and positive response to the messaging campaign (Kalyoncuoglu & Faiz, 2015).

Dix et al. (2016) presented findings contrary to earlier studies. In the Dix et al. study, participants could not opt-in or out of the campaign. This study's deviation might be culturally based. The study participants were South Korean. A more probable explanation is that 96% of participants in the study were below 35 years of age and more accustomed to receiving unsolicited messages. It is reasonable to exclude the Dix et al. study when practicing in the United States because the opt-out feature of a campaign was not part of this study, and this feature is required by the U.S. statute.

An example of an ill-fated campaign that underscores the complexity of MIM marketing occurred at the 2011 football game between the University of Alabama and Louisiana State University (*Phillips v. Mozes Inc. et al.*, 2017). In court documents filed by the plaintiff, Wesley Phillips claimed the Coca-Cola Company hired a firm to conduct an SMS campaign for the product Coke Zero (*Phillips v. Mozes Inc. et al.,* 2017). Phillips responded to an SMS message from Coca-Cola’s agent at the stadium to vote for the best team. Coca-Cola’s agent, Mozes Inc., sent numerous unsolicited messages requesting more information and sent additional advertisements for other products. Phillips did not respond to repeated requests. Phillips sued Mozes and Coca-Cola for violating the Telephone Consumer Protection Act of 1991. The case settled after five years in the litigation. Even for companies as large as Coca-Cola, the high cost of litigation is an unacceptable and completely avoidable outcome for a marketing campaign. A clear and well worded opt-in message would have prevented this suit (Federal Trade Commission, 2009)

While *Phillips v. Mozes Inc. et al.* (2017) case is a moral tale for marketers, this case is only anecdotal evidence of the need for marketers to use permission-based strategies. Consumers respond positively to messages when the consumers believe they have control or autonomy over their participation in the campaign (Fang et al., 2015; Wu, Kao, Wu, & Huang, 2015). Fang et al. (2015) reported a 37 times higher response rate for participants who opt-in versus those who do not opt-in for location-based advertising.

Permission acquisition alone is not a significant predictor of marketing success, but the failure to do so creates negative consumer reactions (Gupta, 2015). These negative reactions may result in injury to reputation or, in extreme cases, lead to litigation. Practitioners in the United States, permission-based marketing is the only process available under U.S. law. Consumer perceived autonomy enhances trust in marketing instant messages by allowing consumers to control the degree of engagement. The most effective consumer engagement allows consumers to opt-in and out of the marketing campaign (Fang et al., 2015).

Strategy: Location-Based Messages

Location-based marketing uses a context-aware platform incorporating the geographic position of consumers and mobile devices to engage consumers. Location-based marketing delivers personalized content based on the location of the customer. Choi et al. (2017) found combining personalization of the message with a consumer’s location influenced the perceptions of benefits gained from engaging in the campaign positively. Location-based advertising is more effective than an advertisement sent otherwise under any other situation (Fang et al., 2015). However, customer attitudes toward advertising are still negatively affected by irritation caused by low-value messages and poor timing (Varshney & Joy, 2015).

Consumers are more willing to engage in mobile marking campaigns using location-based advertisements when consumers trust the source of the message (Shin & Lin, 2016). Location-based mobile marketing campaigns raise a consumer’s concerns for the privacy of their personal information (Gana & Thomas, 2016). To effectively engage consumers with a personalized message, it is necessary to collect some personalized data on consumers, putting marketers and consumers at odds (Choi et al., 2017). Marketers engaging consumers with MIM need an affirmative consent from the consumer to gain permission to engage the customer in the future and collect at least minimal personal information to allow for personalized communication (Tseng & Teng, 2016). As a matter of practice, marketers might delay the collection of personal information until the customer grants some degree of consent.

Strategy: Personalization by Product

Consumers respond positively to personalized messages (Tseng & Teng, 2016). In addition to name-based and location-based personalization, product personalization is also effective (Choi et al., 2017). With product personalization, marketers only send messages to consumers interested in the product or service (Choi et al., 2017). Another form of personalization is the inclusion of the recipient's name in the message. Marketers employing personalization strategies should also employ other trust-building measures, particularly strategies positively modifying the perceived autonomy of consumers (Varshney & Joy, 2015).

Strategy: Enhance the Perceived Value of the Message

While using the mind mapping technique, two overarching themes became evident in the literature review: enhance the trust of customers and enhance the perceived value of the message (see Appendix A). Message value strategies included two subcategories: provide a monetary incentive and provide high-value content. When marketers employ the two strategies of increased monetary value and high-value content with strategies to increase trust, the results are synergistic, enhancing the perceived value of the message (Khajehzadeh et al., 2014).

Strategy: Include a Coupon or Discount

Mobile coupons, unlike paper coupons, are easy to distribute, redeem, and reconcile, thereby enhancing the convenience value in the consumer's eyes. One of the most common ways marketers enhance the perceived value of commercial messages is through the use of coupons. Coupons typically offer a price discount or some variant of a discount, such as a two for one coupon given to consumers (Mendelson, Mantz, Gorder-Hinchey, & Bowie, 2015). While traditional paper coupons have declined in popularity, online coupons continue to grow in popularity (Danaher, Smith, Ranasinghe, & Danaher, 2015).

There are two major differences between redeemed mobile and print coupons. Mobile coupons have ten times the redemption rate of traditional coupons (Berman, 2016). Another difference between traditional print coupons and mobile coupons are the demographic redeeming mobile coupons. Mobile coupons are redeemed by a younger, better educated, and more affluent demographic than that of traditional coupons (Mendelson et al., 2015).

Danaher et al. (2015) claimed mobile coupons are an understudied area with only six mobile coupon studies researched before their study. With remarkable differences in demographics and redemption rates, Danaher et al. suggested other differences might become evident with additional study of mobile coupons. MIM advertising campaigns will not employ only one marketing strategy per campaign. These mobile campaigns are complex and employ as many as a dozen strategic considerations to engage the customer. The interaction of various strategies and synergist effects on the consumer needs further exploration. For example, none of the researchers have yet studied mobile coupon use in combination with a location-based personalization strategy (Mendelson et al., 2015).

The observed strategy synergism led to a recommendation by Danaher et al. (2015) to shorten coupon expiration dates. This shortening of the expiration dates encourages a sense of urgency with the consumer. This recommendation might only be valid for coupons sent when the customer is in proximity to the store. In such a case, marketers mixed the strategies of discounts, location, and consumer urgency.

Strategy: Enhance Informational Value

Marketers increase the perceived informational value of a message by increasing the significance, urgency, or entertainment value of the message. A message sent to the customer should be of high significance or importance to the customer (Bakr & Tolba, 2016). Second, marketers should create a sense of urgency with consumers (Wong, Tan,

Tan, & Ooi, 2015). Finally, marketers can provide an entertaining or funny message (Okoe & Boateng, 2015).

A message's relevance or importance is essential to engage consumers successfully (Bakr & Tolba, 2016). Consumers perceive informative messages favorably, which reduces a consumer's sense of irritation at receiving the message (Aydin & Karamehmet, 2017). Bakr and Tolba (2016) found message value is related to a consumer's perception of the message. Different customers with different needs or interests value the same message to varying degrees. This finding supports the conclusion that marketers should employ multiple marketing strategies.

While increasing message value seems obvious, the practice is far more complex. Lin, Zhou, and Chen (2014) found gender might impact the consumer's message valuation with a p-value above 0.05. Faqih and Jaradat (2015) also conducted a study evaluating gender as an influencing factor toward acceptance of advertisements. Faqih and Jaradat conducted their study in Jordan. Their findings are similar to Lin et al., but the gender differences were less significant in Faqih and Jaradat's study. Gender modified anxiety, playfulness, and the perceived usefulness of mobile coupons. While behavioral intent was not modified, suggesting that gender may not influence the willingness of the user to engage in the desired behavior. The findings from these studies suggest that gender will have some impact on the consumer's willingness to participate in the MIM campaign in the United States (Ha & Im, 2016). These studies did not control for cultural differences or nationality.

The second approach marketers can use to increase message value is by creating a sense of urgency with consumers to act upon the message (Wong et al., 2015). Discounts need to have a short duration to prompt consumers to act upon the offer when in proximity to the store location (Wong et al., 2015). Marketers enhance the value of the message through the use of a discount or time-sensitive information. Consumer location and the time the consumer receives a message change the perceived value of the message and reduces customer irritation (Wong et al., 2015).

Marketers can provide a funny or entertaining message (Okoe & Boateng, 2015). Ducoffe (1996) defined entertainment as the fulfillment of a customer’s need for escapism, diversion, or enjoyment. When consumers receive an entertaining MIM, Salem (2016) found consumers are more likely to engage. Okoe and Boateng (2015) found entertainment increases message value and the likelihood that consumers will engage with the advertisement. Additionally, entertaining engagement leads to higher customer satisfaction and loyalty (Salem, 2016).

Technology Acceptance Model

Researchers have three significant advantages by using the TAM to analyze a consumer’s decision-making processes in adopting a specific technology. The first and most significant advantage is the TAM’s prominence in consumer behavior research, providing a substantial body of work to compare results (Lee, Koopmeiners, Rhee, Raveis, & Ahluwalia, 2015). Secondly, the TAM is philosophically a rational model and a derivation of the theory of reasoned action.

TAM can be used to explain the acceptance of new technologies by consumers (Davis, 1989). This model offers a simplified method to determine the influence of the perceived usefulness and perceived ease-of-use variables on the behavioral intent of consumers to accept the technology. Figure 1 graphically shows the relation of the variables in TAM. The flexibility of TAM allows researchers to modify and extend the model to include variables external to the model. TAM is an important theoretical model for practitioners in the age of personal technology.

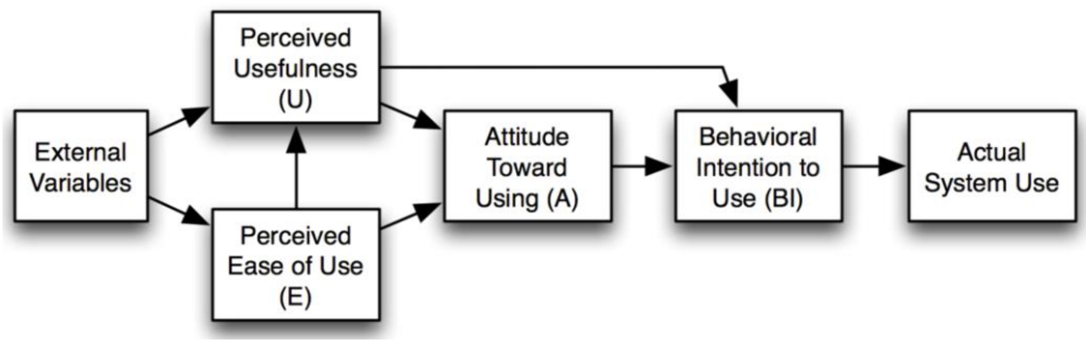

Figure 1. The technology acceptance model. Adapted from "User acceptance of computer technology: A comparison of two theoretical models," by F. D. Davis, R. P. Bagozzi, and P. R. Warshaw, 1989, *Management Science, 35*, p. 985. Copyright 1989 by INFORMS. Reprinted with permission.

To estimate the size of the body of work using the TAM, I conducted a series of simple searches using Google Scholar. I limited the search to article titles and abstracts using the phrase: technology acceptance model. The results of this search between 2005 and 2018 included nearly 84,000 published articles. While there are limitations to this analysis of the literature, such as the need for verification of topic in a statistically significant manner, the high number of studies using TAM is evidence of the significance of the model. Figure 2 indicates the annual growth over the last decade in publications with the TAM in the title or abstract, indicating a 300% increase in the number of papers published per year. The analysis of the data suggests the use of TAM is both appropriate and applicable to my doctoral study.

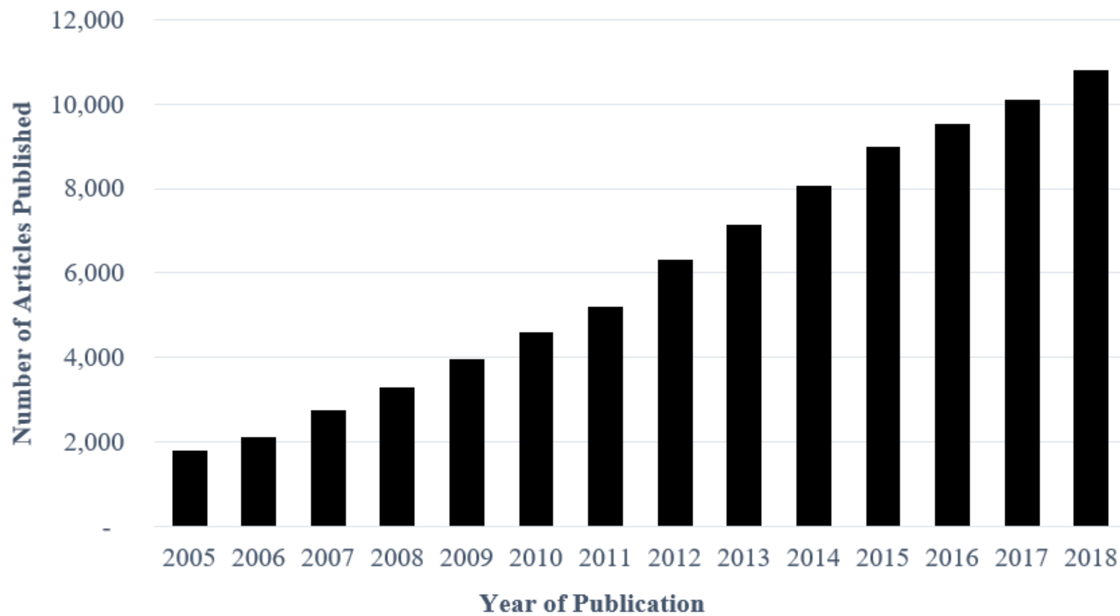

Figure 2. TAM usage in article title or abstract. Results of the literature search showing the number of journal articles by year using TAM in the title or abstract.

Early Development of the Technology Acceptance Model

Through TAM, Davis (1989) proposed for each new technology, users adopt new technology to do a task based on their behavioral intent. Perceived usefulness and perceived ease-of-use affect behavioral intent. A number of forces influence a user's decision-making process. Davis' extension of the theory of reasoned behavior contains an element of the subjective norm that Davis excluded from TAM. Davis, Bagozzi, and Warshaw (1989) revised the original theory to include the subjective norm. This version of TAM, known as TAM2, appears to account for about 40% of consumer behavior (Venkatesh & Davis, 2000).

The low explanatory results of TAM led Davis to the extension of the original model. Venkatesh and Davis (2000) stated TAM2 explains the perceived usefulness and usage intentions, including social influence (subjective norm, voluntariness, and image), cognitive instrumental processes (job relevance, output quality, and result demonstrability), and experience. This extension of TAM improved the explainability of the model to 50–60% of users' intentions to adopt (Venkatesh & Davis, 2000). Figure 3 provides a visual representation of changes to TAM by Venkatesh and Davis.

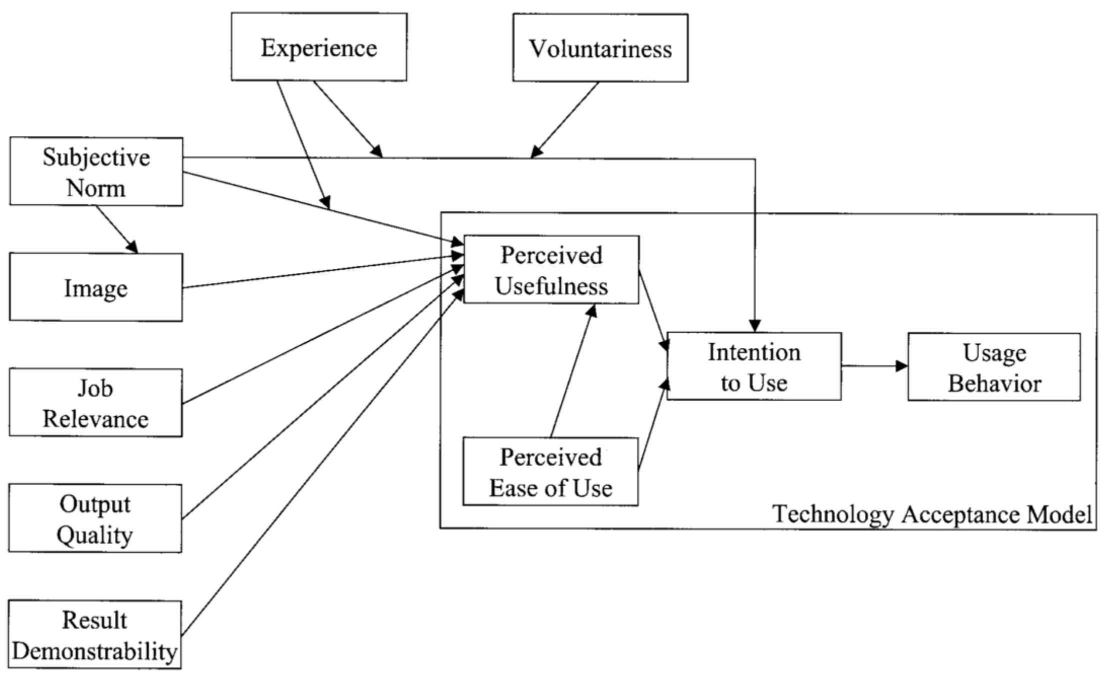

Figure 3. TAM2: An extension of TAM. Adapted from "A theoretical extension of the technology acceptance model: Four longitudinal field studies," by V. Venkatesh and F. D. Davis, 2000, *Management Science, 46*, p. 188. Copyright 2000 by INFORMS. Reprinted with permission.

TAM2 includes three constructs, subjective norm, voluntariness, and image, as critical factors affecting user acceptance or rejection of an innovative system (Venkatesh & Davis, 2000). The inclusion of the subjective norm as a variable improved the model's explanatory power. Davis (1989) derived TAM from the theory of reasoned action. The development of TAM2 was a significant advancement over TAM because of the improved explanatory power of TAM2 (Venkatesh & Davis, 2000). The TAM2 included select external variables modifying the perceived usefulness of the technology and ease of use. The new variables included in TAM2 are rational variables and almost exclusively modify the perceived usefulness variable of TAM.

Davis (1989) acknowledged that for each technology, the influence of perceived usefulness and the perceived ease-of-use on behavioral intent are different. The limitations of the TAM led to an extension of TAM by Venkatesh and Davis (2000). This extension of TAM includes elements from the theory of reasoned behavior.

The next significant evolutionary step of the technology acceptance models occurred in 2003 (Venkatesh, Morris, Davis, & Davis, 2003). Venkatesh et al. (2003) introduced a model TAM3. The TAM3 variant of TAM was a significant revision to TAM2, which included two clusters of mediating variables modifying the perceived ease-of-use factor in the TAM model. TAM3 included two cohorts of antecedents, expectancy, and adjustments that modify perceived ease of use, one of the original TAM variables. The TAM3 extension has 41 potential variables (Venkatesh et al., 2003).

With 41 variables in TAM3, the model became difficult to use in research. TAM2 and TAM3 have TAM (Figure 3) at the core of each theory. In both instances, Davis and Venkatesh attempt to identify antecedent variables modifying the perceived ease-of-use and the perceived usefulness of TAM (Davis, 1989; Venkatesh et al., 2003). Davis and Venkatesh both demonstrated the ease of extending the TAM. This ability to add antecedent variables is a significant advantage of using the TAM in research.

Unified Theory of Acceptance and Use of Technology

Venkatesh et al. (2003) attempted to identify the antecedents to the perceived ease-of-use variable in the TAM. Venkatesh believed that TAM had not adequately identified the various antecedents influencing perceived usefulness and perceived ease of use, and might never adequately explain consumer intent. While TAM2 and TAM3 have the TAM at the core of each theory, Venkatesh deviated significantly from the concept of TAM when he eliminated the perceived usefulness and perceived ease-of-use variables in his model (see Figure 4). Venkatesh's model is known as the unified theory of acceptance and use of technology (UTAUT). UTAUT includes both utilitarian and nonutilitarian variables.

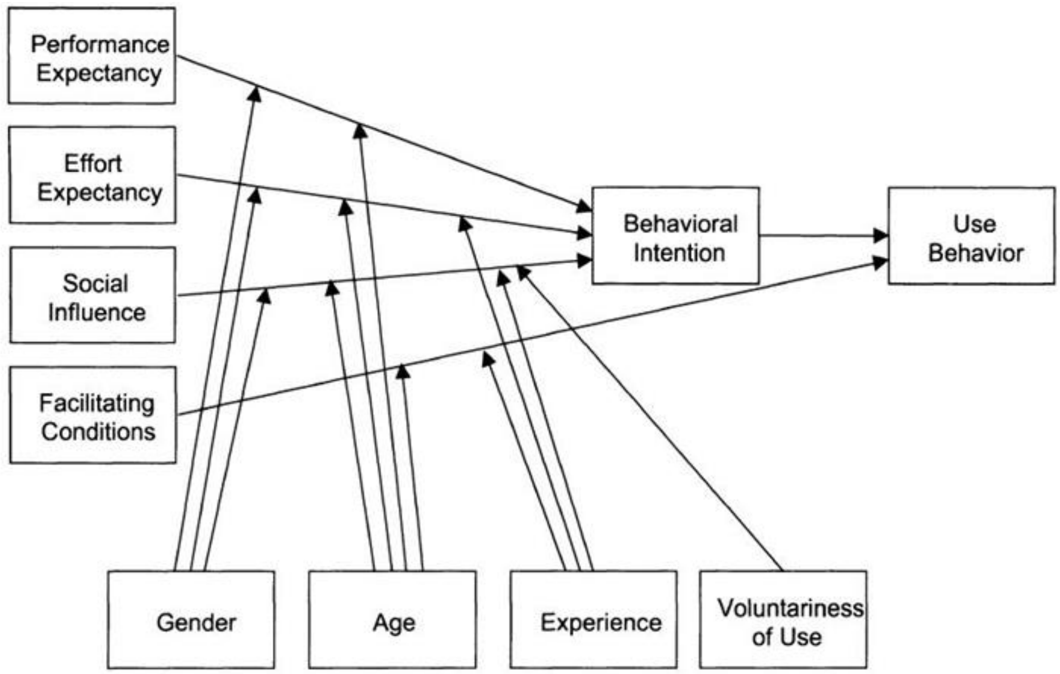

Figure 4. ***Unified theory of acceptance and use of technology***. Adapted from "User acceptance of information technology: Toward a unified view," by V. Venkatesh, M. G. Morris, G. B. Davis, and F. D. Davis, 2003, *MIS Quarterly*, *27*, p. 447. Copyright 2003 by MIS Quarterly. Reprinted with permission.

In the next significant extension of TAM, the developers recognized a need to unify the various TAM extensions (Venkatesh et al., 2003). The new model, the unified theory of acceptance and use of technology (UTAUT), has four major factors: performance expectancy, effort expectancy, social influence, and facilitating conditions. Venkatesh et al. proposed UTAUT in an attempt to unify the various TAM extensions. UTAUT like TAM3 continued to grow in complexity. In TAM3, researchers dropped the immediate use of perceived usefulness and perceived ease-of-use as primary factors. Figure 4 graphically represents the strong influence of gender, age, experience, and voluntariness on consumer acceptance of personal electronics. Note how these influences impact the primary factors differently. While this construct adds some complexity to the model, the total concept is a simplification over TAM3. UTAUT was about 56% effective on behavior intent, which was similar to TAM2, which was 50-60% effective (Venkatesh, Thong, & Xu, 2012).

Venkatesh et al. (2012) addressed some of the theoretical issues with UTAUT by proposing UTAUT2. Venkatesh narrowed the focus of UTAUT2 to the usage of mobile systems. UTAUT2 has additional constructs and relationships integrated to adapt the theory to the mobile consumer. Integrating hedonic motivation complements the UTAUT2 model's best predictor of utility. Much of the improvement in UTAUT2 explanation of behavioral intent was evident from the addition of hedonic motivation as a factor. UTAUT2 explains about 74% of consumer behavioral intent (Venkatesh et al., 2012).

The focus in UTAUT2 is consumer acceptance of the technology. This narrowing suggests a modified version might be more useful for corporate or situations where consumer choice is limited. Alternatively, Ingham et al. (2015) extended TAM by adding perceived risk, enjoyment variables as influencers of the user's attitude. Ingham et al. added social influence and trust to the direct influence on behavioral intent. These additions improve the predictive nature of the model.

Criticisms of the Technology Acceptance Model

After reviewing 20 studies from different disciplines, Attuquayefio and Addo (2014) concluded that when using the UTAUT model, it is wise to carefully choose the right combination of variables as this can have a significant impact on a study. Bogozzi (2007), author of the first extension of TAM, expressed a fundamental problem with TAM. Bagozzi concluded that the determinant nature of TAM is a flaw in the model because the model does not provide for choice by the consumer to self-regulate. Bagozzi stated UTAUT and the various TAM extensions were patched together rather than presenting a genuinely unified theory (Rondan-Cataluña, Arenas-Gaitán, & Ramírez-Correa, 2015).

TAM and TAM2 do not include nonutilitarian external variables. As discussed, the use of TAM variants TAM3 and UTAUT does not include the customer-focused variables such as trust, risk, and enjoyment. The Ingham et al. (2015) version of TAM is the conceptual framework for this study.

iTAM - The Conceptual Framework

The technology acceptance model, as extended by Ingham et al. (2015), is also known as iTAM (see Figure 5). I chose iTAM as the conceptual framework for my doctoral study. Ingham et al.’s (2015) extension of TAM applied to MIM provides a model to evaluate the use of emotional or nonutilitarian antecedent variables to TAM. The model included trust, enjoyment, social influence, and risk in the marketing process.

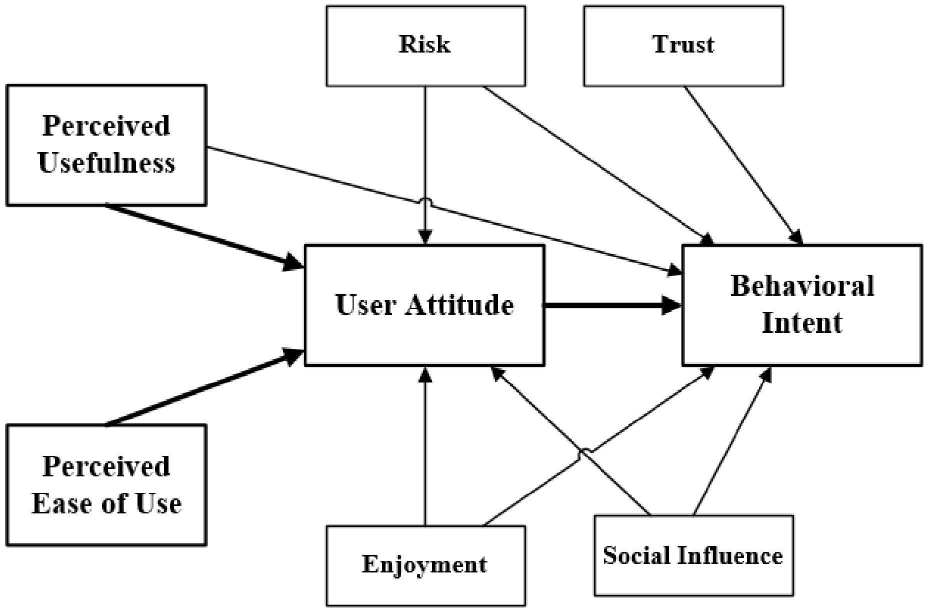

Figure 5. iTAM: An extension of TAM. Adapted from "e-Shopping acceptance: A qualitative and meta-analytic review," by J. Ingham, J. Cadieux, and A. M. Berrada, 2015, *Information & Management*, *52,* p. 50. Copyright 2015 by Elsevier B. V. Adapted with permission.

While shopping, a consumer's motivation for purchasing changes depending upon the purpose of the shopping event (Ha & Im, 2016). Customers respond differently depending on whether their motives are utilitarian or nonutilitarian. Utilitarian purposes for shopping might include shopping for food, clothing, and house cleaning supplies. Nonutilitarian purposes might include shopping for jewelry, membership to a golf or tennis club, or shopping for shoes when shoes are not needed. Danaher et al. (2015) included both utilitarian and nonutilitarian variables in the model for marketing-related purposes. The inclusion of nonutilitarian variables in iTAM adjusts for the deterministic nature of TAM. The inclusion of nonutilitarian variables is important because consumers also make decisions based on emotional factors, as well the perceived ease of use, and usefulness of the technology as initially proposed by Davis (1989) for TAM (Slade, Williams, & Dwivedi, 2014). All the permissions to use the copyrighted figures in my study are included in Appendix B.

Advantages and Limitations of Adopting TAM

There are three significant advantages if researchers use TAM to analyze the consumer's decision-making processes in the adoption of a specific technology. Davis created the TAM to evaluate the consumer's willingness to use a technology. The TAM is a flexible model allowing researchers to modify and extend the model to include external variables easily. The most significant advantage of using TAM is the prominence of TAM in consumer behavior research providing a significant body of work to compare results (Ingham et al., 2015).

The limitations of using TAM are significant. Managers need a tool to forecast consumer responses to new technologies (Arbore, Graziani, & Venturini, 2014). The problem with new technologies is that a consumer's acceptance is not predictable with TAM without more evaluation. Lastly, TAM lacks an emotional component as a significant variable. iTAM overcomes this issue by adding several emotional components. The nonutilitarian variables in iTAM include perceived risk, perceived trust, and enjoyment (Ingham et al., 2015).

Transition

Section 1 was an introduction to the importance of customer engagement using MIM marketing. Digital marketing is quickly becoming a dominant form of marketing in the twenty-first century (Williams, 2015). With the emergence of the smartphone, users now perceive their mobile phones, not as a phone, but as personal technology. Unlike other technologies, the rise of personal technology changed the marketing environment by introducing consumer emotions associated with smartphone usage and interaction (Ingham et al., 2015).

The focus of this qualitative multiple case study was the exploration of strategies marketing managers use when employing MIM to engage customers. The research effort was to summarize and report the use of MIM strategies to improve customer engagement. Section 2 includes discussions of how I conducted this study. The topics in Section 2 include my role as the researcher, the selection and protection of participants, the research method and design, the quality control measures, and the data collection and analysis processes for the study. Section 3 includes the presentation of the findings, application to professional practice, implications for social change, recommendations for action, recommendations for further research, reflections, and conclusions.

Section 2: The Project

Purpose Statement

The purpose of this qualitative multiple case study was to explore strategies marketing managers use to improve customer engagement using MIM. The target population for this study was marketing managers utilizing MIM as a marketing tool in the southeastern region of the United States. The implications for positive social change included the improved engagement of consumers to contribute to increased sales, less litigation, and rapid dissemination of information. The benefits of this improved engagement of consumers accrue to local communities through increased tax revenue, higher job performance for marketing managers, and a public benefit of a more informed public.

Role of the Researcher

The role of the researcher in this qualitative case study included designing and planning the project, seeking institutional review and approval, data collection, analysis, and reporting. Yin (2018) holds a researcher's role includes the functions of the data collector, data analyst, and presenter of the findings. One of my primary functions as the sole researcher for this study was to capture and learn about a phenomenon within the context of the participants by gathering, analyzing, and reporting data in an unbiased manner while conducting the research ethically. Areas of possible bias are the relationships of a researcher to participants, location, or topic (Korstjens & Moser, 2018).

I had no relationships with any of the participants, nor the companies that agreed to participate. I had experience developing software applications that made use of MIM technologies. I never conducted a marketing campaign using MIM technology. I have personally participated in MIM marketing campaigns as a customer.

Yin (2018) pressed the point that interviews are an essential source of case study evidence. In this study, I used semistructured interviews for data collection. The purpose of the semistructured interview process is to capture a participant's experience related to the subject (Kallio, Pietilä, Johnson, & Kangasniemi, 2016). I used the interview protocol (see Appendix C) to build consistency into the interview process by asking the same questions in the same order, but also provide an opportunity to engage the participants conversationally and to ask follow-up questions. This consistency and flexibility were important in this study, as I asked each participant about different MIM strategies and for exploring their justification for the use of the strategies.

To minimize bias in this study, I carefully constructed interview questions, employed interview protocols, member checking, and methodological triangulation to mitigate the use of my personal lens during the data collection process of the study. The member checking process verified my understanding of the participant's answers, reducing the opportunity of bias. Using methodological triangulation, I verified data gleaned in the interviews against MIM used in the participant's campaigns, and member checking summaries. Methodological triangulation reduced the need for a more significant number of interviews to reach the same level of data saturation (Yin, 2018).

In this study, I attempted to comply with the principles of *The Belmont Report.* *The Belmont Report* contains three ethical principles when conducting research using human subjects, including respect for persons, beneficence, and justice (National Commission for the Protection of Human Subjects and Biomedical and Behavioral Research, 1979). Respect for persons means the study's participants have the right to be informed, treated with courtesy, and have the right to decide to give and withdraw their consent (National Commission for the Protection of Human Subjects and Biomedical and Behavioral Research, 1979). Respect for persons also demands researchers truthfully deal with participants in all areas of the study and do no deceit (National Commission for the Protection of Human Subjects and Biomedical and Behavioral Research, 1979). The meaning of beneficence is do no harm while maximizing the research opportunities and reducing the risk to the participant (National Commission for the Protection of Human Subjects and Biomedical and Behavioral Research, 1979). Justice is reasonable, nonexploitative, and well-considered procedures administered fairly (National Commission for the Protection of Human Subjects and Biomedical and Behavioral Research, 1979). The participants should benefit from the research if possible. In this study, the participants understood they had the power to opt-in and out of the study. All participants were capable of giving informed consent.

Castillo-Montoya (2016) suggested using an interview protocol as a method for researchers to achieve consistency during interviews. I used an interview protocol to maintain consistency during the interviews and improve the reproducibility of the study (see Appendix C). In the protocol, I used open-ended questions aligned with my research question. Yin (2018) held interview protocols are useful tools to help with consistency in studies. By following the interview protocol, I reduced the possibility of my biases influencing the data collection process.

Participants

I used a purposive sampling strategy to select participants for this study. Using a purposive sample technique, I eliminated generalized bias by selecting participants with knowledge of the subject. The rationale for employing purposive sampling in this study was the assumption that participants experienced in digital marketing are most likely to have the information about the research topic.

There were seven inclusion criteria for participants in the study. First, the participants were marketers conducting digital marketing in the southeastern United States. Second, participants engaged in MIM marketing campaigns. Third, participants had experience in developing digital marketing strategies. Fourth, the participants were over the age of 18 years. Fifth, participants had at least one year of marketing experience. Sixth, the participant was a marketing manager or previously served as a marketing manager. Seventh, participants were able to give or withdraw consent for participation. Each candidate met all inclusion criteria and provided informed consent to participate in the study.

As a member of the local chapter of the American Marketing Association, I requested assistance from the local chapter. I asked members to assist me in identifying companies engaged in marketing using MIM. These contacts formed that starting point for identifying potential participants.

Researchers should establish trust with participants (Kornbluh, 2015). Failure to develop trust with participants could jeopardize the reliability and validity of the study. The first step in establishing trust and a developing working relationship was to identify a location where the interview participants felt relaxed and secure. I met two of the participants in their offices and the two others in a local coffee shop. In all cases, I offered to meet the participant at a neutral site as the first option. Throughout the recruitment and qualification steps, I worked to establish a personal connection with the participants. With each meeting, telephone call, and email, I was professional, respectful, and appreciative of participant involvement in the study. I was careful to respect the participant's limited time and did not send repeated messages for a meeting within any two-week period.

Data collection in this study included the transcripts of the semistructured interviews of marketing managers, member checking, and MIMs used in 11 campaigns. This study included three cases. Each case included one or more participants. The multiple case study design necessitated the completion of the dataset by achieving data saturation (Barnham, 2015). Data saturation existed when no new information presents in the data collection process (Barnham, 2015; Yin, 2018). In this study, member checking, follow up questions, and collection of campaign text messages continued until no new information emerged from the data sources. I achieved data saturation in this study when no new information emerged from a case during the data collection process.

Research Method

Qualitative methodology was the research method for the study. I considered three methodologies for this study (a) quantitative, (b) qualitative, and (c) mixed methods. Using the quantitative research methodology includes quantifiable variables with the emphasis on precision and accuracy by statistically measuring the variables in real-world environments (McCusker & Gunaydin, 2015). In quantitative research, a researcher constructs a hypothesis and tests the hypothesis analytically. The data collection method in this study did not involve the construction or testing of a hypothesis; thus, I excluded the quantitative research method from consideration.

The second research method considered was the qualitative method. Qualitative studies allow researchers to explore nonquantifiable subjects, such as subjective opinions, beliefs, experiences, attitudes, and actions such as strategies to improve outcomes (Barnham, 2015). Qualitative studies are not experimental, and researchers do not need to control experimental variables (Yin, 2018).

The third research method considered was mixed methods. Mixed methods research includes qualitative and quantitative elements in the same study (Yin, 2018). Researchers use the qualitative method to identify themes or variables, and then use the quantitative methodology to analyze the relative size and relationship between the variables (McCusker & Gunaydin, 2015). The data I planned to collect in this study consisted of interview transcripts, member checking summaries, and documents provided by participants for my analysis. No data collected in this study were in a numerical format; therefore, I excluded the quantitative and mixed methods and selected the qualitative method to explore how marketing managers use MIM strategies to improve customer engagement.

Research Design

The objective of qualitative research is to answer *how*, *what*, and *why* questions (Patton, 2015). Patton (2015) organized qualitative research into five distinct research designs as narrative, grounded theory, ethnography, phenomenology, and case study. In this study, I considered three research designs, including ethnography, phenomenology, and case study.

Ethnographic researchers explore the daily lives, behaviors, beliefs, and activities of an intact culture or community (Percy et al., 2015). Ethnographic researchers commonly collect data using field observations and interviews (Percy et al., 2015). My research did not include the study of a culture or community; therefore, the ethnographic study design was not appropriate.

Phenomenological researchers seek to interpret lived experiences and interpretations of a phenomenon from the perspective of who experienced the phenomenon, gaining an understanding of and insight into experiences, behaviors, attitudes, processes, beliefs, and opinions of participants (Percy et al., 2015). A study based on participants' real-life perspectives, feelings, assigned meanings to a phenomenon would not have allowed me to identify strategies used when marketing with MIM.

Case study researchers seek an in-depth exploration of a phenomenon (Percy et al., 2015). Yin (2018) contended a case study design is well suited to explore the decision-making processes and strategies used in businesses. In this study, I explored the use of MIM strategies to improve customer engagement. Case study research questions are usually *how*, *what*, *or why* type questions (Yin, 2018). I used multiple cases to answer the main research question by exploring how marketers from different organizations engaged customers with MIM.

In this study, I ensured data saturation by using methodological triangulation of the data. The three data sources in this study included data from semistructured interviews, member checking summaries, and MIMs used in marketing campaigns. Researchers can use methodological triangulation to achieve data saturation (Fusch & Ness, 2015). By using methodological triangulation in the data collection process, I made it possible for the study to reach saturation.

Population and Sampling

I used a purposive sampling strategy to select participants for this study. Purposive sampling is a nonprobability sampling technique (Etikan, Musa, & Alkassim, 2016). Using the purposive sampling method, I identified participants within the population who met specific characteristics (see Appendix D). These characteristics set by me identified participants to explore a particular problem. The rationale for employing purposive sampling in this study was the assumption that participants experienced in digital marketing were most likely to yield information to answer the research question.

Yin (2018) stated that a case study may consist of three or four cases if the study theory is easily understood, and the research question does not demand an excessive degree of certainty. In this study, the iTAM theory was easy to understand, and a high degree of certainty was not required. The number of cases in a multiple case study is not formulaic (Yin, 2018). I decided to conduct three cases. With three cases, I expected three to eight participants to interview. I reached data saturation at four interviews.

Reaching data saturation in qualitative studies occurs when the collection of more data yields no additional findings (Fusch & Ness, 2015). In this study, data collection continued within each case until the member checking process did not yield any additional information. I determined that saturation occurred after I completed the data analysis. In the quest for data saturation, I used an interview protocol, member checking, and documentation review. The reviewed documents without exception included MIMs used by participants in marketing campaigns.

The purposive sampling method narrows the general population of a study to select individuals experienced and knowledgeable about the study topic and have information that may answer the research question (Etikan et al., 2016). I was careful to narrow the criteria for identifying and selecting participants using the study population criteria. Each participant had experience as a marketer conducting digital marketing in the southeastern United States. This criterion qualified the participant geographically and by discipline. I sought participants with experience using MIM in marketing campaigns and had developed strategies to use MIM. This group of digital marketers provided a rich mix of experiences and strategies for this study. Each participant was capable of giving and revoking consent and was over the age of 18 years.

I conducted the interviews at a time and location where the participant was most comfortable. Researchers should establish trust with participants (Kornbluh, 2015). I conducted semistructured interviews at locations selected by the participants. I sought a location where the participant could focus without distraction and feel free to share information to conduct the interviews. I met two of the participants in their offices behind closed doors. Two other participants chose to meet me in a local coffee shop. In all cases, I offered to meet the participant at a neutral site as the first option. The participants suggested the site where I conducted the interviews. The selection of these locations permitted us to carry on private conversations, plus could record the conversations without significant background noise. I conducted each interview during business hours.

Ethical Research

Data were not collected in this study until the Walden University Institutional Research Board (IRB) approved the study. Walden University's IRB approval number for this study was 12-11-18-0131926. I began the selection of participants after the IRB granted approval of the study.

As the sole researcher in this study, I was obligated to protect participant rights to privacy and confidentiality. I protected the participant privacy and confidentiality by removing identifying information from transcripts and other documents. I assigned each participant a unique identification code in the research records. I also had an obligation to protect participants for harm or deception during the interview process. Each participant had the opportunity to meet with me in a location of their choosing away from any personal or professional contacts.

Once identified, I contacted companies to request their organization permit employees to participate in my research project. I explained the objectives of the project and sought approval to view MIM used by the participants in marketing campaigns. I sought participants within the company. Qualified participants who consented to join the study received a participant package. The package included a welcome letter, the study purpose, the consent form, and the interview questions (see Appendix E). Study participation was voluntary.

Another essential component is the practice of informed consent of the participants (Miracle, 2016). Informed consent was a critical component of this study. I contacted each firm, identified the senior representative, and sent the project flyer. The senior management of the participating companies provided a signed letter of cooperation to me. In this letter of cooperation, participants stated that they understood the scope of my research project. Participants from each participating company agreed to share data about their marketing process.

Potential participants within each company received an email from me introducing the study and asking them to join the study. To verify the participant's understanding of informed consent, I discussed the elements of informed consent with the participant. We discussed their right to withdraw from the study at any time and for any reason. No participants withdrew from the study.

The payment of participants increases the likelihood of participants (Jennings et al., 2015). Zutlevics (2016) provided an analysis of the potential ethical dilemmas associated with the practice of providing incentives for participation. In some cases where the risk is negligible, it is permissible to compensate participants financially. I avoided potential ethical concerns by not providing financial compensation to participants.

One of the critical principles of *The Belmont Report* is that researchers must have the explicit consent of the human subjects to conduct the research (National Commission for the Protection of Human Subjects and Biomedical and Behavioral Research, 1979). According to *The Belmont Report*, the participants may withdraw their consent at any time. The participant may quit the study without consequence at any point in the study (National Commission for the Protection of Human Subjects and Biomedical and Behavioral Research, 1979). As part of my interview protocol (see Appendix C) immediately before the interview, I informed each participant of their right to withdraw from the study. No participants withdrew from the study.

Confidentiality of participants is an essential element in qualitative studies (Petrova, Dewing, & Camilleri, 2016). I protected the participants by assigning each participant a participant identification code (PIC). The PIC key contains the names of the participants and the PIC. For instance, if the first company approach was the fictional Sterling Cooper advertising agency. I assigned a letter to each company and a number to each participant, such as A-1 for the first participant and A-3 for the third participant. I scrubbed any documents collected of corporate or personal names or identifying marks, photographed and incorporated into the study files. If I could not scrub the documents, I photographed and stored those documents separately in an encrypted folder on my Google drive.

The research plan included the storage and protection of collected data using an online service and external media to store copies of the study files (see Appendix G). I will maintain three sets of the files for 5 years (a) data stick stored in a safety deposit box, (b) a data stick maintained in my office in a locked file cabinet, and (c) an electronic copy maintained by CertainSafe in a digital safety deposit box. I will maintain these files for 5 years from the date of approval of my final study. I will destroy the data files after 5 years by deleting the encryption keys and the related files.

Data Collection Instruments

I was the primary data collection instrument. In qualitative studies, the researcher is often the primary data collection instrument (Yin, 2018). The research plan included the use of face-to-face semistructured interviews using the interview protocol (see Appendix C) to collect research data, member checking of my interpretation of their answers to verify the reliability of the interview responses, and analyzing supporting MIM advertisements used in marketing campaigns formed the data set for this study.

With the completion of each interview, the research plan included the generation of an interview transcript and then a synthesis of each response provided by the participant.

Member checking enhances the validity of the study (Simpson & Quigley, 2016). The participant received my interpretation of their responses to the interview questions for their review by the 10th business day after the interview. The participant reviewed my interpretation of their portion of the record. This review process is known as member checking (Yin, 2018). During the member checking process, the participant had the opportunity to review, correct, and expand my interpretation of their responses. I followed up on the interviews using the follow-up interview protocol (see Appendix C). The participants had the opportunity to review, edit, and amend the transcripts. I asked additional questions seeking clarification and documents as needed. The member checking process repeated until the participant had no corrections or additions. During the member checking process, participants provided access to the existing text messages sent in previous campaigns.

An effective qualitative research project includes the maintenance of a research log or diary of the project (Noble & Smith, 2015). Yin (2018) suggests field notes should be part of the project database. My field notes included interview notes and observations, analysis of the study findings, and my raw thoughts about the project as they evolved. These notes were handwritten and chronological. The diary included notes about my thoughts issues that arose during the study. During the interview process, I made notes in my diary about the interview, including follow up questions, possible documents to be requested. After transcription, I recorded follow-up questions I planned to ask at the next contact with the participants. These notes included my various approaches to the organization of the findings. I struggled with how to present the findings. I went through four different organizational strategies before I arrived at the final version. I also used the diary to record ideas about future research and ideas to expand my literature search based upon the interviews. My notes were raw information. Yin (2018) stated that field notes are important to the construction of a case record and that editing and rewriting the notes is probably a poor use of resources. I encrypted a complete photographic record of the diary, and I will store this with the other electronic files for 5 years (see Appendix G).

The use of technology was essential to this study. In my study, I used email to communicate with participants, recording of participant interviews using digital voice recorders, and a camera to photograph documents. I used two recorders to record participant interviews in case one of the devices failed during the interview. The research plan included encryption of the interview recordings. To adhere to the principle of protecting the identity of the participants, I had to do data cleansing to remove irrelevant data and other information identifying the company or the individual.

In the follow-up interviews, I used other technologies, including Zoom.com, to conduct and record follow-up interviews. The use of synchronous online services to conduct interviews using technologies such as Skype or Zoom.us is sometimes necessary (Lo Iacono, Symonds, & Brown, 2016). These software services provided an option to record the interview session. When necessary, I recorded the interview, in addition to using an audio recorder.

Data Collection Technique

This study included semistructured interviews as the primary source of data collection. The interviews included eight open-ended questions (see Appendix E). Semistructured interviews provide rich, in-depth information, capture the participant's perspectives, the process of decision-making, and engagement strategies (Kallio et al., 2016). Kallio et al. (2016) recommended using the semistructured interview when gathering data for a specific number of questions. Utilizing a semistructured interview process is essential to solicit accurate and unbiased information from the participants (Kallio et al., 2016).

In this study, the participants chose the time and location of their interview. The participants allowed me to record each interview and follow up interview. To conduct the interviews, I used the interview protocols (see Appendix C). I read the interview question and allowed the participant time to consider and respond to the question. In some cases, I asked a follow-up question to clarify a statement and sometimes logged observations into the study journal. Once the participant had fully answered the question, we moved to the next question and repeated the process. Within 7 days of the interview or follow-up interview, I transcribed the interview.

In the member checking process, I summarized the answer to each response to each question. The participant received an email copy of my interpretations of their responses. The participant then agreed to a time and place for the follow-up interview. I used the follow-up interview protocol to conduct follow-up interviews (see Appendix C). The participant edited the responses to each question in writing via email or verbally in the interview follow-up. The participant and I reviewed and edited the member checking summary until the participant had no additional edits or changes.

I identified and asked for copies of the MIM from the campaigns. No company provided copies of written procedures, but all had verbal descriptions of their procedures. The initial interviews contained descriptions of the verbal procedures. In two cases, the companies provided email copies of the MIMs. In the third, the company allowed me to inspect the system the company used to send MIMs. The participants permitted me to review the history of the MIMs and record notes in my study journal.

An advantage of semistructured interviews for data collection is participants have the opportunity to answer the questions in a free form, in-depth manner, to give complete answers to the questions (Dikko, 2016). Another advantage of semisructured interviews is researchers can probe, explore, and follow-up on the answers provided by the participants (Yin, 2018). Yin (2018) also identified drawbacks to the semistructured interviews including (a) effectiveness of the interview is dependent on the skill of the researcher, (b) the interview question may be influenced by the personal bias of the interviewer, and (c) participants might have a motivation to provide false answers. I used semistructured interviews to capture the participant's knowledge, perceptions, and opinions as to why the strategies were important in their MIM marketing campaigns. My major concern during the research process was the possibility was a participant would grow bored by the process and quit the project. No participants quit.

Kallio et al. (2016) suggested using passive technologies in the interviews to create a more comfortable environment. The recordings in this study of the interviews with digital voice recorders were consistent with Kallio’s recommendations for the use of passive technologies. The participants in this study reviewed, corrected, and expanded on my interpretation of their responses to the interview questions during member checking. The participants provided requested documents related to the project. The next step in the research process was the organization of the data and coding of themes.

Data Organization Technique

An effective research project includes the maintenance of a research log or diary of the project (Snowden, 2015). The diary for this project contained a chronology of the project, thoughts, insights, and notes. A diary can contain confidential information about participants, such as the PIC, and interview notes (Snowden, 2015). A complete photographic record of the diary was encrypted and will be stored with the other electronic files for 5 years (see Appendix G). The destruction of the diary will occur after the publication of the study. I will shred the diary pages.

Yin (2018) stated the creation of a case study database is essential to the study and for future investigators to duplicate the research. NVivo is a software package commonly used in qualitative research to supplement thematic coding and categorization of collected data (Woods, Paulus, Atkins, & Macklin, 2016). QSR International produces

NVivo software (Zamawe, 2015). The software supports the analysis of interview responses, the member checking responses, and supporting documents collected from the participants (Kaefer, Roper, & Sinha, 2015). Researchers can visually represent the resulting themes and trends using tables, charts, graphs, and maps (Kaefer et al., 2015). I used NVivo to code, categorize, and develop the themes from narrative text. The NVivo data files created in the study are electronic data files and subject to the data protection and security protocol (Appendix G).

Data Analysis

The use of triangulation in a study is an alternate form of validation of one data set against another (Fusch, Fusch, & Ness, 2018). Vaughn and Turner (2015) held an effective analysis of qualitative data that uses a systematic process to organize and assign meaning to the data. The composite of two or more sources of data is stronger evidence about the phenomena in question (Fusch et al., 2018). Yin (2018) recommended that in case studies, researchers should include a triangulation method of collecting relevant data from multiple sources to explain, confirm, or refute the data collected through the interviews process. Methodological triangulation involves collecting data from using multiple methods (Joslin & Muller, 2016). In this study, I used methodological triangulation collecting data from interviews, member checking, and messages used in marketing campaigns by the participants.

Data Analysis Sequence

Qualitative research has no one prescribed method or methods for analyzing case study evidence (Yin, 2018). The most common method of analysis is thematic analysis (Hennink, Kaiser, & Marconi, 2016). Nowell, Norris, White, and Moules (2017) provided a six-step or phased process of analyzing qualitative data (a) familiarizing with data, (b) generating initial codes (c) searching for themes, (d) reviewing themes, (e) defining and naming themes, and (f) producing the report. I used NVivo 12 software to store, organize the database, and to conduct the coding of the data.

The familiarizing of the data in this study included the transcription of the interviews. The transcription process promoted contemplation of what the participant said during the interview. I then drafted a summary of my interpretation of each response and provided the summary to the participant via email. I followed up either in person or by telephone using the follow-up protocol to clarify their edits, revisions, corrections, and deletions in each question summary (see Appendix C). By following the protocol, I minimized the possibility of my biases from influencing the marketing manager during the member checking process. I then transcribed the comments and edits of the follow-up interview and repeated the member checking process. This cycle continued until the participant had no changes or edits. I reviewed text messages discovered in the interview and member checking processes. I uploaded the final versions of the interview transcripts, member checking summaries, and text messages to NVivo 12.

The initial coding process had two phases: the conceptual framework codes and the strategy codes. iTAM has six external variables (see Figure 5). I created nodes in NVivo for each of the variables trust, risk, enjoyment, social influence, perceived usefulness, and the perceived ease of use. I then applied the nodes to the transcripts, member checking summaries, and documents.

The second step of analysis involved generating initial codes. I assigned initial codes based on two approaches to the data. The coding process continued with the identification of strategies. I created nodes related to each strategy identified in the literature review and applied those nodes. I then applied the nodes to the transcripts, member checking summaries, and documents. On a couple of occasions, I found passages that did not fit nicely into the fore mentioned nodes. I created new nodes for those instances. This process generated 42 nodes.

In step 3, I searched for themes by grouping nodes from step 2 into categories. Later, I combined these categories into more general categories. In the end, I had 12 categories or strategies organized into three themes. The analysis process and the generation of themes was not a linear process. Nowell et al. (2017) inferred that coding and analysis steps are cyclical, and the same data may have multiple codes, revised codes, and belong to various categories before the analysis process is complete. I also made journal entries during this stage that included my thoughts about the coding process.

I reviewed the emergent themes and at different times in the process. This study, at times, had as many as six themes. I named each theme, and those names changed as the scope of each theme evolved. The purpose of the data analysis process was to identify patterns, variations, and relationships in the data (Yin, 2018). Steps 4 and 5 reviewing themes and defining and naming themes in this study was a process to reflect on the relationships between the themes identified. Emergent themes are statements of meaning derived from the life experiences of those interviewed (Merriam & Grenier, 2019). I merged and split themes and defined the boundaries of themes.

The final step in data analysis was reporting. NVivo 12 permits researchers to code data sources (Houghton, Murphy, Shaw, & Casey, 2015). I used NVivo 12 to create nodes, then combined the nodes into 32 categories, the categories into 12 strategies, and merged the strategies into three themes. NVivo 12 had reports and extracts I frequently used in the analysis process. These reports and extracts helped me to recognize patterns in the data.

To maintain the timeliness of the literature review, I set up database alerts in Google Scholar. These alerts tracked the publication of new studies related to TAM, SMS, and customer engagement. I found relevant articles through this process and used these articles in the data analysis process and the report of the findings. These alerts occurred weekly.

Reliability and Validity

Reliability and validity are traditional measures of the rigor of a study (Morse, 2015). The rigor of qualitative research has four dimensions dependability, credibility, confirmability, and credibility. In qualitative inquiry, validity and reliability overlap (Morse, 2015). Studies develop reliability through processes (Yin, 2018). Reliability strategies ensure reproducibility by other researchers evaluating the same data source methods and conditions (Yin, 2018). This section includes a description of the plan to establish reliability and validity in the study.

Reliability

Dependability is the extent that the study could be repeated by other researchers and that the findings would be consistent (Pierre, 2017). Dependability is the demonstration of the trustworthiness of the data collection processes and protocols of the study (Korstjens & Moser, 2018). The keeping of a reflexive project diary enhances reliability (Amankwaa, 2016). My study diary contained entries for the completion of project tasks, ideas, observations, and perceptions. The recording of project events, interview observations, tasks, procedures, and protocol notes enhanced the reliability of the study (Marshall & Rossman, 2016). The attainment of reliability in case studies is the development of dependable and reproducible results through rich and well-saturated data (Bengtsson, 2016). This study reached data saturation in the fourth interview.

Yin (2018) expanded the concept of dependability by the use of a study protocol and a study database. The study included the use of NVivo produced by QSR

International to create a project database. The software enables researchers to input interviews, assists the researcher in the synthesis of the interviews, and inputs the corporate data (Woods et al., 2016). Other actions in this study enhancing the dependability of this study included the use of recordings of the interviews, transcription of the interviews, and member checking. These actions ensured a faithful capture of the actual interviews and the meaning gleaned from those interviews. Kaefer et al. (2015) indicated the resulting themes and trends might also be represented visually using tables, charts, graphs, and maps.

Member checking was part of the reliability process of my study. Member checking increases the dependability and transferability of the findings of a study (Fusch et al., 2018). The member checking process ensures investigators fully understand the answers the participants provide (Birt, Scott, Cavers, Campbell, & Walter, 2016). An added benefit of member checking is the opportunity of the participants to join in the quality control process by checking and evaluating my interpretation of the participant answers to the interview questions (Fusch et al., 2018). The interview participants can then review, correct, or expand the synthesized answers. Thomas (2017) suggested participant answers interpreted by the researcher and verified by member checking is superior to transcript evaluation alone. I used member checking and multiple case studies to increase the dependability of the findings of this study.

Validity

Credibility is the confidence the qualitative researcher has in the truth of the research study's findings (Lincoln & Guba, 1985). The credibility of a qualitative study is ultimately determined by the participants in the study when the participants find results believable from their perspective (Marshall & Rossman, 2016). Member checking verifies the accuracy and completeness understanding of the answers by the participants to each of the open-ended interview questions as understood by the researcher (Birt et al., 2016). In this study, I used member checking to validate my summaries of the interview responses. The participants reviewed, corrected, and expanded if necessary, my interpretation of their answers. The participants reviewed every subsequent version of my interpretation of their answers until they had no changes or additions.

Researchers use triangulation to verify or refute the information provided in the interviews (Fusch et al., 2018). Through triangulation, researchers gain a deeper understanding of the participant's experiences. Triangulation uses three sources of data (Yin, 2018). Triangulation builds the credibility of the study with the participant verification, respondent validation, accuracy, and trustworthiness of data recorded during each interview process (Fusch & Ness, 2015). I used triangulation in this study to build credibility. The three sources of data in this study were interview responses, the member checking responses, and the supplied messages used in marketing campaigns.

Confirmability is the degree to which reseachers may corroborate the data, the interpretation of the findings derived from the data, and avoidance of personal bias of the research (Lincoln & Guba, 1985). A detailed discussion of study data and findings support the confirmability of a study (Lincoln & Guba, 1985). In this study, I used member checking to help confirm the participants' responses. The member checking process verifies the accuracy and completeness understanding of the answers by the participants to each of the open-ended interview questions as understood by the researcher (Birt et al., 2016). I used interview protocols and member checking to assure the confirmability of this study.

Transferability is the capability to extrapolate and apply research findings to other organizations, contexts, settings, and situations (Lincoln & Guba, 1985). Thick descriptions are detailed descriptions of participant experiences in enough detail to be helpful in the evaluation of the study's application to other organizations (Bengtsson, 2016). Korstjens and Moser (2018) make the point that transferability is ultimately a judgment by the consumer of the information who will decide if they can apply the finding to their situation.

Morse (2015) held that prolonged engagement, persistent observations, and thick descriptions increase the rigor of the study and improve the transferability of the results. In this study, the interviews and member checking processes provided the necessary prolonged engagement with participants with about one hour of interview time and 45 to 90 minutes of engagement in the member checking process. Thick descriptions refer to the type of data collected and to the whole data set and the number of participants to achieve data saturation (Morse, 2015). The member checking process assured completeness of the data for each participant. The member checking answers to the interview questions assured thick data. In this study, I carefully followed interview protocols for initial and follow-up interviews. I used member checking to verify my understanding of participant answers and verified the findings against available MIM provided by the participants. The combination of these processes increased the transferability of the results of this finding of this study.

Data saturation exists when no new information occurs in the data collection process (Barnham, 2015; Yin, 2018). Fusch and Ness (2015) hold data saturation occurs when no new data in the research is likely to emerge. Within the study, data saturation occurred when no new themes emerged from the data analysis. The point of data saturation comes from the judgment of the researcher (Tran, Porcher, Tran, & Ravaud, 2017). The decision to halt further data collection in each case was an informed decision I made based on the completion of the interviews, the member checking process, and all identified documents were collected or reviewed.

Transition and Summary

The objective of Section 2 was to describe in detail the plan for conducting my study to explore how to use MIM strategies to improve customer engagement. This study was a qualitative multiple case study. As the sole researcher on this project, I worked to minimize personal and procedural bias. Participants in this study were marketing managers practicing in the southeastern United States and who had experience with MIM. I presented the role of the researcher and the ethical bounds of the study. I discussed the plans and protocols to collect, organize, and analyze the study data. Finally, I discussed how reliability and reliability were considered and built into the study.

In Section 3, I include a presentation of the findings of the research, a review of the applicability of the findings to professional practice, social change, followed by recommendations and reflections on this research project, and conclusion. The findings of the study include a detailed description of the analysis of the semistructured interviews of marketing managers using MIM strategies to improve customer engagement. I also present the member checking results and evidence from the text messages used in the marketing campaigns.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of this qualitative multiple case study was to explore strategies marketing managers use to improve customer engagement using MIM. The central research question for this study was: What strategies do marketing managers use to improve customer engagement using MIM? Participants in this study were doing business as marketing managers in the southeastern United States. The study included three companies and four participants. Each of the study participants used MIM as one component of their marketing plans. One of the three companies included SMS, MMS, and Facebook Messenger, while the other two companies only used SMS and MMS in their campaigns. I conducted semistructured interviews at a location selected by the participants and followed up with member checking to verify the accuracy and reliability of the data collected during the interviews. I collected documents from the participants that included MIMs used in marketing campaigns. I reviewed the documents for marketing strategy themes. Without exception, these documents were samples or copies of actual messages sent to customers.

During the data analysis process, I analyzed and coded the data. From the analysis process, I identified three themes and 12 marketing strategies. I used methodological triangulation to analyze the data collected from the interview responses, member checking, and MIM provided by the participants. In this section of the study are the findings of the research, a review of the applicability of the findings to professional practice, positive social change, followed by recommendations and reflections on this research project. The planning for this project began in 2015, and I conducted the research between January 1, 2018 and February 25, 2019.

Presentation of the Findings

The central research question for this study was: What strategies do marketing managers employ to improve customer engagement using MIM? In exploring this research question, I used iTAM as the conceptual framework. To answer the research question, I conducted interviews with four marketing managers from three companies who conducted marketing campaigns in the southeastern region of the United States and implemented MIM as a successful marketing tool.

In this section, I defined three terms to avoid confusion. *Clients* employ marketers to conduct various marketing functions on the client's behalf. *Marketers* engage the customer directly or indirectly through advertising. Marketers may be external firms or internal marketing departments of the client. *Customers* are the recipients of the advertisements.

Table 1 includes the three themes from the study. The three themes found in this study were evident in each firm, but each firm emphasized the themes to different degrees within the firm or campaign. For instance, marketers from two firms emphasize high customer engagement, while marketers from the third firm emphasize high message value. This emphasis may have to do with the type of marketing campaign from one company to the next. Table 1 includes a count of the frequency of times the marketer in a company mentions a strategy from the theme.

Table 1

Identified Themes from the Interviews

Theme	Frequency of a theme by company		
	A	B	C
Theme 1: Build trust	7	8	12
Theme 2: Engage the customer	6	12	9
Theme 3: Optimize the value of the message	2	3	3

Note. A, B, and C represent the three firms interviewed.

Theme 1: Build Trust

Theme 1 was to build trust with the customer. Marketers using MIM as an element of the marketing plan should develop the trust of the customer (Gana & Koce, 2016) Theme 1 includes those strategies listed in Table 2. The participants in this study used these strategies to overcome the customer's distrust, risk concerns, and apathy toward opening the message. Table 2 includes the frequency of times a response from each participant included a particular strategy. The frequency of the strategies discussed aggregated by company.

Table 2

Build Trust

Strategies	Response count by strategy	Cases
Strategy 1: Establish a firm opt-in or opt-out policy	9	3
Strategy 2: Limit the frequency of the messages.	7	3
Strategy 3: Mimic the client	3	2
Strategy 4: Use personalized messages	3	2
Strategy 5: Craft an effective first-line	5	2
Total	27	

Evidence from the literature. Marketers communicate with customers to influence the customer's behavior (Venkatraman et al., 2015). Customers resist engaging in marketing campaigns, even if they have opted into the campaign (Fang et al., 2015). Marketers overcome the customer's resistance to opening the message by engaging in practices that build the customer's trust in the sender and the message (Gana & Koce, 2016). Customers are unlikely to open a message when they have feelings of distrust toward a message (Tseng & Teng, 2016). Customers are more willing to engage in MIM campaigns when customers trust the source of the message (Gana & Thomas, 2016; Shin & Lin, 2016).

Yan and Yang (2015) found trust has a significant effect on a customer's intent to engage. Customers engage when the customer has high trust levels when evaluating an advertisement (Hahn, Scherer, Basso, & Santos, 2016). Customers trust advertisements and the sender when customers believe they, the customer, have control over their participation in the campaign (Fang et al., 2015; Wu et al., 2015). Customers who do not grant permission to participate in a MIM campaign perceive unsolicited messages as intrusive and distrust the sender (Kalyoncuoglu & Faiz, 2015).

To improve the trust of the customer, marketers need to gain explicit permission from customers before engaging customers in a mobile messaging campaign (Kalyoncuoglu & Faiz, 2015). The act of giving consent raises the customer’s expectation of receiving a message. If each message contains the opportunity for customers to exit a campaign, then the perception perceived risk by the customer diminished (Chowdhury et al., 2016). While sending unsolicited MIM advertisements is permissible in some countries, sending an unsolicited MIM advertisement is illegal in the United States under the United States Telephone Consumer Protection Act of 1991 (*Phillips v. Mozes Inc. et al., 2017*).

Marketers intend for personalization of messages to build the trust of the customer using familiarity (Choi et al., 2017). Tseng and Teng (2016) found customers respond positively to personalized messages. However, name-based personalization was often not the most effective version of personalization, raising concerns about privacy (Tseng & Teng, 2016). Customers can perceive name-based personalization as a possible loss of privacy (Uddin et al., 2019). The marketers in this study objected to using name-based personalization as a strategy due to a perceived increase in the perceived risk by the customer.

The contrarian findings by Tseng and Teng (2016) found name-based personalization was the most effective. Participants in this study did not use name-based personalization for MIM campaigns. The P2, P3, and P4 stated the use of name-based was too much trouble, and in one case, P3 stated the strategy was counterproductive. These findings support the findings of Tseng and Teng as related to personalization. This result might also indicate a cultural shift from prior studies.

The relevance or importance of the message is essential to engage customers successfully (Ishaq, Javed, & Karim, 2015). Bakr and Tolba (2016) found customers became irritated with the receipt of low-value messages or too many messages. Overuse of the MIM communication channel or sending of perceived low-value messages diminished the relevance of the message to the customer (Ishaq et al., 2015).

Evidence from the data collected. Participants in this study had several specific strategies to build trust with the customer. These strategies consisted of (a) establish a firm opt-in or opt-out policy, (b) limit the frequency of the messages, (c) mimic the client, (d) use personalized messages, (e) craft an effective first line. The participants emphasized different strategies but included all five strategies. One marketer stressed limiting the frequency of the message, while another emphasized the importance of the first line of the message, and a third practiced highly personalized messages to build trust with the customer.

Strategy 1: Establish a firm opt-in or opt-out policy. Marketing campaign compliance with applicable state and U.S. federal law pertinent to mobile messaging was a priority for all participants in the study. The participant's attitudes toward compliance were emphatic and may crossover from the realm of strategy to a business policy. Participant P3 expressed this approach to MIM as, "It is increasingly important to understand that we cannot force people to do this, they have to opt-in."

Opt-in is not the only part of the compliance activities of the participants. The opportunity to opt-out of the marketing campaign was also essential to the success of a campaign. Participant P4 elaborated on his company's opt-out strategy as:

> Every single message that we send finishes off with the last words, 'stop to end.' Anybody that puts in anything close to [the word stop], if they reply anything 'stop,' 'stop to end' anything like that; they immediately get opted out. We never message them again.

Participant P4 expressed confidence that this strategy protects the firm and the brand of the client during the marketing campaign.

Two of the participants described giving incentives to customers to opt-in to a campaign. Participant P1 reported providing a give-a-way gift to opt-in to the campaign. Participant P2 informed, "If we go on air and say 'Text [your city name] to 65686 for your chance to win tickets,' then they [the customer] are opting into the campaign." The concern about this approach, as expressed by P1 and P3, where customers might be more interested in the incentive rather than participating in the campaign. Participant P1 experienced this type of problem and incurred the added expense of providing the incentive to uninterested customers.

All three companies participating in the study had an informal policy to prevent sending unsolicited messages and to allow customers to exit the campaign at any time. Evidence of the effectiveness of those policies is that all 16 MIM collected in the course of the study contained statements to allow participants to exit the campaigns. Document D1 contained the statement "Send STOP to end," document D5 contained "Text STOP to cancel," and document D8 contained the statement "Reply STOP to end these valuable messages."

Strategy 2: Limit the frequency of the messages. Marketers may reduce the perceived risk promising to limit the number of contacts. Participant P1 said, "People are pretty guarded about their mobile phone numbers. They are more guarded about their text message box than they are about…other apps we use for messaging purposes." Participant P3 suggested that marketers assure customers as follows: "You will not be bombarded with messages or sales opportunities or buying opportunities if you involve yourself with the marketing campaign. We will not be sending you solicitations every hour or something like that."

Participants P3 and P4 suggested that one of the initial messages after the customer opts-in to the campaign should include a description of the frequency and timing of the MIMs. This approach further expands the trust of the customer and reduces the perceived risk of engaging in the campaign. Participant P2 stated, "We assure customers will only be presented with three or four, maybe five messages a week when the customer opts-in to the campaign."

All three companies participating in the study had an informal policy to limit the frequency of the messages. In the documents supplied, only one company sent multiple messages within a 7-day timeframe to the same customer list. The first message, D12, sent on a Tuesday, with a message to reply to enter a contest by Friday to have the opportunity to win $10. On Friday, a reminder message, D13, to enter by 6 p.m. Only the policy by P3 allowed multiple messages in the same week but was limit to 3 or less. P4 might send a second message if a major weather event or school closing in the same week. All three companies abided by their stated policy on frequency.

Strategy 3: Mimic the client. For third party marketers mimicking the client's identity increases the trust in the message. Two of the firms used strategies to emulate the client in a campaign. Participants P1 and P4 used client logos in the message to allow the customer to identify the source of the message quickly. P4 reported, "We use MMS exclusively. All of the messages we send contain images." Using logos in the message required the shift from SMS to MMS to allow for images to be included in the message.

Participant P4 expanded specific tactics used to mimic the client. In addition to the use of the client logo, P4 acquired a telephone number similar to that of the client. If the client's telephone number is 865-200-1xxx, then P4 would purchase a number for MIM use that might be 865-200-2xxx. Participant P4 also includes the name of the client in the first line of the message. For example, "Hi, Steve! This is X University." P4 explains their reasoning, “In the first sentence, also again, it reaffirms, and identifies where the text is coming from, [and] is easily identified.” P4 described the importance of the combination of these strategies as, “And, those three things [log, telephone number, and the first line of the message] have reduced the risk, and have increased the likelihood to respond.”

All three of the companies in this study advertised for external clients. Two of the companies advertised for using MIM directly to customers to promote their services and products. Each company practiced this strategy. Documents D8-D13 contained only the name of the client in the message. Documents D1-D7 contained the logo and the client's name in the message. Documents D14-D16 contained the client name, the client logo, and a telephone number that appears to be a client telephone number. The participants used client logos, images, text, and telephone numbers to impress upon the customer that the source of the message was from the client.

Strategy 4: Use personalized messages. The inclusion of the name of the customer is a very common form of personalization (Lee & Rha, 2016). P4 provided an example of such a message “Personalization is if we said ‘Hey, Phil, we see that you are interested in the communications program.’” Participant P1 cautioned, “In our experience sending messages individually [not mass marketing], that is, customized messages to each person get a better response than sending a mass message to multiple people. This is applicable for both SMS text and Messenger on Facebook.”

Participants in this study did not use name-based personalization for MIM campaigns. The participants P2, P3, and P4 held the use of name-based was too much trouble. In one case, P3 stated the strategy was counterproductive in that “the use of first names in the message has a certain creep factor.” None of the sixteen messages contained the name of a customer.

The customization by participants in this study took the form of content customization. P4 customized the content of the messages by selecting only customers who needed the specific content. This content helped the customer to move through the purchase process. Document D14 contained the statement, “We can help you complete your application to XXXXXXX University.” P4 provided customized content to the customer who is considering attending that university.

Strategy 5: Craft an effective first line. Crafting an effective first line of the MIM is essential to overcoming the distrust of the message. Participant P1 expands on the difficulty marketers have in MIM. P1 said, “They [customers] are busy, or they are tied up, and they are not responding, or they do not want to be interrupted.” Most MIM applications allow for the incoming telephone number or name of the sender and at least one line of the message. This first line is typically 23 to 32 characters (U.S. Patent No. 2019/0097954, 2019). Participant P1 stated, “I think it [the first line] presents [an] opportunity marketers can build on because the first line shows up [immediately]. Whatever be the portion of the message consumers see, it catches their attention.”

Participant P1 stated, “Marketers have a very brief opportunity to get the customer to open the message. If it is a video, it is those first five seconds. If it is a message, it is that very first headline.” Participant P4 has a *three-second* rule. P4 expanded on the concept, “If in three seconds, I cannot tell who the message is from, and what you want me to do, then go make a new message.” P4 justifies this rule as:

> That [three seconds] is the attention span you have [to work with] when a message is received by one of your prospects. You have about three seconds. I should be able to look at any message, and within three seconds, know the subject of the message.

The opportunity to encourage the customer to open the message cannot be lost. Participant P1 developed a series of questions to test the start of the message as follows:

> Does it feel good? Does it create that emotional connection? Does it [the message] create that urgency to open [the message] and to see what you might be missing out on or the gift you might get or the opportunity that's there?

The 16 MIM provided by the participants contained first lines that ranged from 18 to 30 characters in length. The message first line of documents D5 and D6 was “Buy one get one free.” Documents D8 and D9 first line were “Win 2 xxxxxxxxx tickets.” The first lines for D15 and D16 were “Get help with your application,” and “Your application to xxxxxxx [college].” These first lines were enticements to begin the engagement process. All first lines of the MIM relayed some immediate value to the customer.

Support from the conceptual framework. The conceptual framework for this study was the iTAM (see Figure 5). iTAM included two exigent variables the perceived trust and risk by the customer that influence the customer's attitude to engage in a marketing campaign. Trust is the perception of the customer as to the trustworthiness of the sender of the MIM (Ingham et al., 2015). The trust positively influences the behavioral intent of the customer to engage the campaign (Ingham et al., 2015).

Risk is the potential loss of something of the customer values (Ingham et al., 2015). In the context of MIM, the perceived risk includes the loss of privacy, personal information being made public, and the theft of financial information (Schnall, Higgins, Brown, Carballo-Dieguez, & Bakken, 2015). The perceived risk negatively influences the customer's attitude and the intent of the customer to engage in the marketing campaign (Ingham et al., 2015). The iTAM model suggests customers are concerned about risks to personal information and risk of annoyance when joining a campaign (Ingham et al., 2015).

Finally, in Theme 1, the perceived ease-of-use (PEOU) variable of iTAM suggests a reason why marketers were so concerned about the first line of the message. The PEOU is the degree of difficulty a customer has using a technology. The easier PEOU, the more likely the customer will engage in the campaign (Ingham et al., 2015).

In this study, the crafting first line of the MIM maximized the usefulness of the message and increased the likelihood the customer engaged.

The findings of this study in theme 1 included five strategies to build trust with the customer or to overcome the customer’s mistrust of a MIM. These strategies used by marketers were consistent with the iTAM model to reduce the perceived risk of engagement and increase the trust of the customer, so customers open the message and engage in the desired behaviors.

Theme 2: Engage the Customer

If marketers are to engage customers with MIM campaigns, getting the customer to open and read the well-crafted message is the next challenge. Informative messages reduce a customer’s sense of irritation at receiving the message if the customer assigns sufficient value to the message (Aydin & Karamehmet, 2017). Bakr and Tolba (2016) found message value was related to a customer’s perception of the message. Different customers with different needs or interests value the same message to varying degrees.

Evidence from the literature. To increase the value of a message, marketers can provide a funny or entertaining message to engage customers (Okoe & Boateng, 2015). Ducoffe (1996) defined entertainment as the fulfillment of a customer’s need for escapism, diversion, or enjoyment. When customers receive an entertaining MIM, customers are more likely to engage (Salem, 2016). Okoe and Boateng (2015) found entertainment increased the perceived message value and the likelihood that customers will engage with the advertisement.

Enjoyment is difficult to offer via older MIM technologies such as SMS (Ingham et al., 2015). SMS does not permit marketers to send images, while MMS has a character limit over 1000 characters, and marketers may send text, hyperlinks, images, video files, and other documents (Kalyoncuoglu & Faiz, 2015). With MMS, marketers may combine various media into a single message sent to customers (Wong et al., 2015).

The customer assigns the value of the MIM for the content or information contained within the message (Aydin & Karamehmet, 2017). Informative messages are messages where the customer assigns value to the message as it relates to the perceived value of the information in the message (Aydin & Karamehmet, 2017). Informative messages might include simple messages such as reminders for deadlines set by campaigns.

The use of humor in this study aligned with one of the findings of Okoe and Boateng (2015). Entertaining content increased the message value and the likelihood that customers would engage the advertisement (Salem, 2016). Okoe and Boateng found that entertainment and humor increased message value and the likelihood that customers will engage with the advertisement.

Table 3 includes a summary of the strategies used by the participants to improve the read rate of the sent messages. The participants used four strategies to get customers to consume the content of the message. Each strategy had at least two cases using a strategy, but the different managers varied the degree to which the participants used or emphasized the strategy.

Table 3

Engage the Customer

Strategies	Response count by strategy	Cases
Strategy 6: Use the right messaging technology	2	2
Strategy 7: Use a call to action	5	4
Strategy 8: Use humor and emotions to connect	4	2
Strategy 9: Use highly relevant messages.	2	2
Total	13	

Evidence from the data collected. Participants in this study had four specific strategies to engage the customer. These strategies include (a) use the right messaging technology, (b) use a call to action, (c) use humor and emotions to connect, and (d) use highly relevant messages. The participants emphasized the strategies that best fit their situation or campaign.

Strategy 6: Use the right messaging technology. Marketers from two of the firms participating in this study used MMS exclusively. Participant P4 stated the importance of MMS messages as:

> We probably sent out somewhere between three to four million text messages last year. So, we do massive text messaging. The third strategy is moving over to MMS, instead of an SMS and then putting in easily

> identifiable images, that show the [client's] logo. It makes for an immediate visual identification [of the message source].

Participant P1 supports the use of MMS. P1 explained the importance of sending images, which SMS does not allow, as, "I would get less of a response rate, even from more active customers, if I did not send an image [in the message]." This strategy is related to the marketer using images to communicate with the customer. The participants provided a document from each of the platforms used to market to customers. Company A used only SMS and MMS, while company B used SMS, MMS, and Facebook. Company C used SMS, MMS, Facebook, and Instagram.

Strategy 7: Use a call-to-action. The call-to-action is a clear statement by the marketer in the advertisement of the desired behavior of the customer. Using a call-to-action in the message was important to achieving the desired influence. P1 described their use of the call to action as:

> My call to action might be opt-in, to message us back, to visit our website. In order for them to do that, we will offer that value, like a coupon or a discount, or it could be a promotional product, a giveaway.

Participant P4 informed, "MMS message that I think has both good creative and easily identifiable, and also a good call to action in terms of what you want the person to do."

This call to action might be to click on a link or a picture. Participant P3 provided discount codes for redemption if the customer visited a retail establishment. Free coffee and pastry with a [gasoline] fill up is an example of this type of advertisement. The marketer should clearly direct customers as to how to engage in the campaign. All the participants in this study used this strategy.

All documents contained an identifiable call-to-action. The call-to-action is a clear statement by the marketer in the advertisement for the desired behavior of the customer. The 16 documents contained five specific calls-to-action. The included phrases were “text yes” in documents D5-D7, “click here” in documents D14-D16, “reply xxxxxx to enter” in documents D8-D11, and “reply help” in documents D3 and D4. The participants supplied messages form ongoing or recent campaigns.

Strategy 8: Use humor and emotions to connect. Study participants found entertainment increases message value and the likelihood that customers will engage with the advertisement. Participant P1 described this strategy as:

> People respond more to images than they do to actual words, the written word or spoken words. I feel like folks want to see it more than they want to hear it or read it. We have had a big tick up, for me, in the power of our relationships and how the business relationships get built.

P1 further elaborated on evaluating an advertisement before the advertisement is sent out: “Does it feel good? Does it create that emotional connection?” P4 also focused on the use of specific imagery in a campaign to connect emotionally with the customer. “Select the imagery carefully to complement the message…The use of imagery to connect emotionally with the customer is a very powerful tool.” P1 stated:

> Using images to provoke emotions [of customers] very effective. Think about a short [video] of playful puppies. People will watch, it is fun, it is emotional, and initially requires a low commitment. They will watch it [video] several times and often share it. In the end, they [the customer] is open to engaging next time because of the emotional connection [with the marketer].

The participants were less likely to use humor as a strategy than the previous seven strategies. Only one document, D7, contained a graphic, an animated emoji as a response after the initial engagement that could be considered humorous. Nine messages included pictures of people engaging in fun or happy activities, including D1-D7, D14, and D16. Participant P4 indicated in the interviews, the inclusion of these pictures created an emotional connection with the customer.

Strategy 9: Use highly relevant messages. Study participants stressed the importance of using highly relevant and valuable messages. P1 expanded:

> So the message is quick, low commitment levels, but with tidbits of important information that will cause them to act on the call to action or to start a conversation…I only send information of high value or a message with value. The content of the message must contain information content of value about events or reminders, or the message must contain a coupon or the opportunity to get something of monetary value.

P2 built on this idea of value:

> We are just providing information. For a company wanting to do something [with MIM], then the incentive would be something they [customers] could either reply to by replying [with a] shortcode or keyword and then they [the customer] get the value of the offered… It [the value of the message] must be something of value. And the value is really important. A candy bar costs maybe fifty cents, we can give it away, but there must be enough value for them [customers] to act. We are always concerned with the value and perceived value, which are different things entirely. But the value of the message must exist, and if they [the customer] see you sending out worthless information, they are going to block you.

Support from the framework. The iTAM conceptual framework includes two direct variables, PEOU, and perceived usefulness, both modify the attitude and behavioral intent of the customer to engage in the desired behavior (Ingham et al., 2015). The framework also includes one exogenous variable, enjoyment, addressed in this theme (see Figure 5.). The PEOU variable also modifies the attitude of the customer toward the advertisement and is associated with the content of the message (Ingham et al., 2015).

Davis (1989) suggested that perceived usefulness is key to getting customers to engage. The perceived usefulness of a message includes the value the customers assign to the message content (Ingham et al., 2015). Marketers may enhance the perceived usefulness of messages sent using MIM by the use of images, animations, video clips. The use of multimedia allows marketers to engage customers with multiple sensory inputs (Kalyoncuoglu & Faiz, 2015).

One of the participants, P4, used humor to engage the customer in document D7. iTAM includes the variable enjoyment. Enjoyment variable in iTAM modifies both the customer attitude toward the advertisement and the customer behavioral intent to engage (Ingham et al., 2015). The use of humor is positively modified the customer attitude and behavioral intent to engage (Ingham et al., 2015).

Theme 3: Optimize The Value Of The Message

Marketers increased the perceived informational value of a message by increasing the significance, urgency, or entertainment value of the advertisement message (Bakr & Tolba, 2016). A message of high value or importance were more likely to be engaged (Bakr & Tolba, 2016). Secondly, marketers created a sense of urgency with customers by artificially imposing a time limit on an offer (Wong et al., 2015). Finally, marketers who provided an entertaining or funny message also increased engagement (Okoe & Boateng, 2015).

Evidence from the literature. The relevance of a message or importance of the message information was essential to engage customers (Bakr & Tolba, 2016). When customers perceived informative messages favorably, the customers are more tolerant of messages that otherwise might cause irritation (Aydin & Karamehmet, 2017). Bakr and

Tolba (2016) found a positive relationship between message value and a customer's perception of the message.

The second approach marketers used to increase the value of the message value was the creation of a sense of urgency by the customer to act upon the message quickly (Wong et al., 2015). Wong et al. (2015) found discounts in MIM need to have a short duration to prompt customers to act upon the offer when in proximity to the store location. Marketers enhance the value of the message through the use of a discount or time-sensitive information. Customer location and the timing of a message change the perceived value of the message and reduce customer irritation (Wong et al., 2015).

A high-value message increased the likelihood of the customer engaging in the desired behavior (Bakr & Tolba, 2016). When marketers used an increased monetary strategy and one of the high-value message strategies, a synergism occurred, enhancing the perceived value of the message by the customer (Khajehzadeh et al., 2014).

Table 4 is a summary of the strategies used by the participants to improve the read rate of the sent messages. The participants used three strategies to enhance the perceived value of the advertisement or the desired behavior. Each strategy had at least two cases using a strategy, but the different managers varied the degree to which the participants used or emphasized the strategy.

Table 4

Optimize Message Value

Strategies	Response count by strategy	Cases
Strategy 10: Use Chronos timing	5	3
Strategy 11: Use Kairos timing	6	3
Strategy 12: Use monetary offerings	5	2
Total	16	

Evidence from the data collected. Participants in this study used three specific strategies to enhance the value of the message. These strategies include using (a) Chronos timing, (b) Kairos timing, and (c) monetary offering. The participants emphasized the strategies that best fit their situation. P4 used both Chronos and Kairos strategies, while P1 and P2 used Kairos and monetary strategies to optimize the message value.

Strategy 10: Use chronos timing. Participant P2 told of an account where their company used marketing research to determine the best day and time to send a mass message to mobile devices. P2's company initiated a mobile club for a client. P2 said, "They sent out a message every Tuesday at 7 a.m. to that club that … [about] the special offer for that day." In this specific case, "customers were too busy on Mondays" to engage. "From the research, Tuesdays were the first optimum day to send the message" each week. P2 excluded Fridays and weekends because " the [customers] did not value the message as highly as Tuesdays, Wednesdays, or Thursdays." P2 selected 7 a.m. to send the message. P2 justified the timing " 7 a.m. allowed the customer to receive the message and remember to visit the store on the way to work or on the way home to fill up the car [with fuel]" and to claim the value of the message." P2 stated, "the xxxx mobile club eventually grew to more than 20,000 members".

Participant P3 brought up the issue that if there is a right time to send a message, then there also exists a wrong time to send the message. P3 said, "They want to know they are not going to be texted at 3 a.m. with a 5% off something." P3 observed, "poorly timed messages irritates them [customers] and caused people [customers] to quit the campaign."

The majority of documents, 15 of 16 messages, applied the chronos timing strategy. The timing assigned to the messages appears consistent with the most like time the customer would consume and use the information. The campaigns each sent additional messages at the same time on a different day.

Strategy 11: Kairos timing. Participant P4 said:

> So, we try and time our text messages; there is no way we would send a text message to a group of undergraduates students at 11:30 in the morning. It is just not working; they [the customers, who are high school students] do not have their phones on; they are in school; they are not looking at [their phones].

P4 held the time of day is of my least concern. P4 related, “The best time to send a message is when the student [customer] is ready to engage.” P4 further described his approach as follows:

> When you look at undergraduate students, and you think about their week, and you see, we keep track records, of the times, when they open, both text and email, and you see that there's this, like a little peak, between 6:00 a.m., and then it dives down, really down low, until like two or three o'clock in the afternoon, and then at two or three o'clock in the afternoon, response rates keep going up, to where they usually peak around 8:00 p.m. to 9:00 p.m.

Participant P4 discussed a campaign they prepared for high school seniors. The campaign sought to get the students to apply to the client’s university. P4’s company developed this strategy well in advance of the event triggering the initiation of the campaign. P4 said:

> In other parts of the country, it is common for school closure because of the weather. So, I will give you an example that tomorrow, there is a nor'easter rolling through the northeast, and it [the storm] is going to be a major snow event. We know already today that high schools will be closed tomorrow. We have primed a good number of text messages for our partner's schools [client’s] to go out this evening, to say, “Hey, while you are home tomorrow from school, would you like to speak with a

> counselor? Would you like to apply to a school?" We know that a student has free time and they are not in school during the day. While we have their attention, we prime them [the students] …We might include lovely imagery of the campus covered in snow. So we make an emotional connection with the snow, and those are the messages, where we see, just the ultra-high responses.

In addition to the chiros timing strategy, one participant, P4, sent three messages during a substantial weather event where the customers were more likely to engage because the customers are secluded from the distraction of friends and outside activities. During this time, the customer had time to focus on their college application. The reasoning to send messages during a storm is consistent with a Kairos timing strategy. The participant's selection of the day to send the message is an example of the Kairos timing strategy. During the snowstorm, the customer had more undistracted time to commit to the campaign.

Strategy 12: Use monetary offerings. Monetary offerings via MIM are often adequate to attract customers to engage in desired behaviors in Dix et al. (2016). The marketers in this study used monetary offers to get customers to opt into campaigns, to listen to other media, to buy a service, and to visit retail stores. P1 said:

> The monetary offer depends on what you offer. For instance, a dentist for which we are running a campaign. The value in what they [the customer]. The value is intrinsic to what they [dentist] do. So, for that customer, the value [of the

> message] is offering free teeth cleaning, or maybe a $10 teeth cleaning. Give the customer some reason to come through the door.

P3 relayed:

> If you are sending, "Here is a roll of toilet paper. Come on in. 10% off a roll of toilet paper." Who cares? The value must be there, and if they [customers] see you sending out junk, they [customers] are going to block you. You can start seeing the churn. We had a big customer [client], and as they [the client] mismanaged the offerings…And after about six months, they [the customers] started dropping [out of the campaign]. People were saying, "I do not want this anymore" or "This is bothering me" or "I don't want this!"

P1 used incentives to encourage customers to share more information with the marketer but warns excessively valued incentives could have an undesired outcome. P1 related:

> If we incentivize a call to action and we misplace the value, people will act on that call to action just to get the value. Then as we follow up on that lead, we find out, oh, this wasn't as qualified [a lead] as we thought, or this wasn't as targeted of a lead as we thought. These [customers] were just wanting free stuff. We had more than a thousand responses. What I didn't consider is how long it would take to process 1,000 addresses and 1,000

emails. It cost us a lot of money for processing and postage. The offer was too big.

Participants used a monetary offering strategy in 6 of 16 messages. The participants used this strategy to offer incentives to customers to engage in the desired behavior. In these six messages, participants offered a free cup of coffee, candy bar, or a jacuzzi in exchange for the desired behavior. Three of the four participants offered customers the opportunity to win cash or tickets to encourage engagement in four additional messages.

Support from the framework. Marketers used the strategies from this theme to optimize the value of the message involve three areas relevance, timing, and monetary value. The variable, the perceived usefulness in the iTAM is a direct antecedent of the customer's attitude toward the advertisement, and the behavioral intent to engage the campaign (Ingham et al., 2015). Perceived usefulness is a measure of the customers' perceived value of the message or behavior (Ingham et al., 2015). These strategies acknowledge the variable nature of value to the customer.

Application to Professional Practice

The findings of this study included 12 strategies marketing managers may use to improve customer engagement when marketing using MIM. When MIMs are trusted by and provide value to the customer, MIM marketing messages have a 35% engagement rate (Bakr, Tolba, & Meshreki, 2019). This rate is an order of magnitude higher than other digital media advertisements with mobile search 3.1% and banner ads at 0.63% (Bakr et al., 2019). The strategies in this study may help marketing managers bridge the need for effective strategies. The findings of this study could benefit marketing managers in their professional practice and convey new information offering practical methods to improve customer engagement using MIM.

A significant finding of this study is marketing managers may need to establish a policy of never sending an unsolicited MIM. Customers view unsolicited MIM advertisements as a violation of trust (Shareef et al., 2015). This policy should establish a process for customers to leave a marketing campaign at any point. Sending only solicited MIMs builds trust with the customer and keeps the marketer in compliance with U.S. law (Telephone Consumer Protection Act of 1991). If marketing managers establish a process for customers to leave a campaign and make this option available in every message, then customers control their participation in a campaign, thus easily preventing potential violations of U.S. law or lawsuits filed by customers.

Another significant finding of this study is marketing managers should use strategies designed to engage the customers emotionally and intellectually. Participants in this study used images, entertaining content, and highly relevant information to engage the customer. Customers desire informative, appealing, and entertaining MIM advertisements (Aydin & Karamehmet, 2017). The creation of entertaining content comes with a warning to marketing managers about the use of humor. Shifting cultural norms can quickly cause humor to become offensive to some customers (Berlant & Ngai, 2017). The offense can be unintentional but may cause significant harm to a brand or corporate image. (Warren, Carter, & McGraw, 2019).

A significant finding of this study is that a name-based strategy does not work to engage customers. Baig and Faiza (2014) and Lee and Rha (2016) held that name-based marketing with MIM is effective. All participants in this study rejected the use of name-based MIM strategies. The differences between this study and the prior studies might be cultural differences, or heightened concerns about privacy using MIM, or possibly a shift in customer expectations. While the cause may be of importance for future study, in practice, marketing managers doing business in the southeastern United States may want to avoid using name-based strategies.

The final recommendation to marketing managers is the importance of using multiple strategies in combination to create the desired outcome. The success of an MIM campaign may be dependent upon the use of as many strategies as possible simultaneously. In this study, the range for the number of strategies used in each message was from 8 to 11 strategies. Marketing managers may increase the likelihood of campaign success by maximizing the number of strategies implemented in each MIM.

Implications for Social Change

The implications for positive social change from this study could be the transfer of knowledge regarding strategies to engage prospective or existing customers through their smartphones in marketing campaigns conducted by nonprofit organizations in the southeastern United States. Nonprofit organizations use MIM to advertise products and services, fundraise, and to educate customers in cause-related campaigns (Dube, Luo, & Fang, 2017; Hughes, 2018). Nonprofit organization marketing managers who conduct marketing campaigns may benefit in the adoption of the MIM strategies from this study.

Nonprofit organizations promote positive behaviors of customers and prevention-related behaviors (Mosteller & Poddar, 2017). Behavioral modification campaigns by nonprofit organizations may improve the local communities. Nonprofit organizations have promoted behavioral modification campaigns such as smoking secession, suicide prevention, and public health issues (DeStasio, Hill, & Berkman, 2016; Mohammed et al., 2019). Nonprofit marketing managers have the opportunity to aid, to educate, and to improve the lives of their customers through effective engagement (Moreno-Munoz, Bellido-Outeirino, Siano, & Gomez-Nieto, 2016). The adoption of the strategies of this study may increase engagement leading to improved behaviors and positive social outcomes.

Effective communications of nonprofit organizations may improve the socioeconomic situations for communities in the southeastern United States. Improved customer engagement may lead to high donor engagement. Higher donor engagement benefits nonprofit organizations through increased financial support and public exposure (Nageswarakurukkal, Goncalves, & Moshtari, 2019). The increased funding may allow for expanded or sustained services to the community. There is a cumulative benefit to communities in the southeastern United States through the adoption of these MIM strategies to improve customer engagement using MIM by nonprofit organizations.

Recommendations for Action

The results presented in this study can help marketing managers create strategies to improve customer engagement in MIM campaigns. In this qualitative multiple case study, I explored the strategies used by marketers in MIM campaigns. The study findings include three themes (a) building trust strategies, (b) customer engagement strategies, and (c) message value optimization strategies.

Marketing managers should consider adopting or adapting the proposed strategies to meet the organization's needs. Most importantly, marketing managers should review the underlying principles in each strategy. This consideration might lead marketers to adapt the strategy to their situation. The findings in the study may apply to any organization using MIM as a marketing tool, including small businesses, marketing firms, local governments, and nonprofit organizations. Marketing managers may choose to convert these themes into new processes or incorporate these themes into their current processes.

I plan to distribute the findings of this study by providing a summary of the findings after publication to participants. I also anticipate writing a journal article for an academic journal for publication. Finally, I plan to incorporate the findings of this study into a graduate marketing class on social media marketing. I have written the new syllabus for the class.

Recommendations for Further Research

Recommendations for further research related to this study started with the identified limitations of this study included sampling, geography, and temporal restrictions. To extend the findings, future researchers should recruit a larger population sample and participants from other regions in the United States or other countries. Participant attitudes might be affected by regional or national attitudes toward MIM advertising.

Bakr and Tolba (2016) reported that the literature is replete with studies about mobile messaging advertising, but not with a consensus on the effectiveness of MIM strategies to engage the customer. Similarly, Kezar and Maxey (2016) explained Delphi studies are well suited for analyzing inconsistencies among experts and complex issues problems with variables, including the methodology of delivery, message, and type of product. The literature strongly suggested that the name-based strategy should work to engage customers (Baig & Faiza, 2014; Lee & Rha, 2016). However, all the participants in this study rejected the use of name-based MIM strategies. The potential complexities of using name-based MIM advertising might include cultural differences, concerns about privacy, personal preferences, age, and gender differences. The Delphi technique applies to the exploration of particularly complex problems (Kezar & Maxey, 2016).

I gathered the data for my project over the spring and summer of 2018. In the ever-evolving field of social media, a study conducted in a new period might include the possibility that the perceptions and acceptance of social media communications. Replication in a new period, location, or with larger sample might yield additional insights to regional specific strategies, gender, and age-specific strategies. Faqih and Jaradat (2015) also conducted a study evaluating gender as an influencing factor toward acceptance of advertisements. Muk and Chung (2015) found cultural differences between the United States and Korea as far as acceptance of MIM advertisements.

The conceptual framework for this study, iTAM, was only one of the variants of TAM. Much of the work with TAM by prior researchers extended the number of external variables that affect the behavioral intent of the customer. Future researchers might explore extending iTAM to a post-engagement process. Ingham et al. (2015) constructed iTAM to explain customer behavior before engagement. Marketers using MIM should be prepared to reengage the customer after the initial message is delivered. The concerns marketers expressed about engagements with the customer when the customer decides to respond via MIM. TAM is primarily a tool to explain singular events. Customer relationships are a series of events. Researchers might explore extending TAM to include variables that are post-engagement to create a cycle of engagement.

Reflections

I began this doctoral journey, with ideas, and expectations that needed to be refining and, in some cases, expunged from my thinking. Initially, I struggled with scholarly writing, and the skills I developed have changed the trajectory of my career. This process has helped me change not only my writing but also my teaching. I now strive to encourage and teach my students to become lifelong scholars and practitioners. I teach my students to analyze situations, to solve problems, and most importantly, to communicate the analysis and solutions effectively through writing.

In this study, I learned to be an effective researcher. I identified the problem, explored the existing knowledge base, selected the research design, developed a study plan, and protocols for conducting the research. These protocols included considerations to protect the participants, to minimize personal biases, and to protect the data. By strict adherence to the protocols of this study, I minimized the possibility that my interactions with the participants might influence the answers they gave to the interview questions.

I did struggle with certain aspects of the research, but this too helped me evolve as a learner. I especially struggled with writing and the discipline it takes to complete a study of this nature. I have been a researcher for nearly 40 years, yet this study challenged my ability to organize data and explain the findings in both an academic and professional practice form.

The findings of the study might extend the knowledge of marketing managers using MIM-based marketing. I anticipate the knowledge gained from this study will lead to new opportunities for me. First, I look forward to incorporating more of this material in a graduate class that I have written on social media marketing. Secondly, I plan to set up a long-running project to regularly survey or interview marketers in the southeastern

United States to monitor shifts in strategies by marketers using MIM. I look forward to the challenges of new research and future publications.

When I started this study, I came to it with only the experience of a customer and not as a marketer. My professional background in information technology probably shaded my understanding of the topic. I had preconceived ideas about the MIM technologies were highly utilitarian. This utilitarian view of MIM is not a universal view or even all that practical as marketers use more sophisticated strategies to engage customers with nonutilitarian tools. The literature review greatly expanded my perceptions of the marketing complexities involved in communicating effectively through MIM. This complexity quickly inundated any experiential biases I may have had at the start of the project.

I am very grateful to the participants in this study. These very busy people sacrificed their time to answer questions about how they communicate with customers. I hope they will see their fingerprints on this study and will be able to use the presented findings.

Conclusion

Marketing managers can improve customer engagement when using MIM by applying the strategies presented in the findings of this study. The positive implications of this study for improved customer engagement may be the transfer of strategies of how to engage customers through MIM more effectively. The themes of build trust, engage the customer, and optimize the message value identified in this study may help marketing managers modify or improve current business practices for creating MIMs.

The ubiquity of the smartphone makes MIM a highly desirable medium to reach and engage the customer quickly (De Silva & Yan, 2017). However, the warning, “Don’t do stupid stuff” applies to MIM marketing (Coletta & Carrese, 2015, p. 32). The successful MIM marketer will send MIMs with relevant, high-value content to the customer at the moment the customer most wants that information. In order to improve customer engagement using MIM, marketing managers should be deliberate at every stage of the planning and execution of their MIM campaign, testing and using strategies presented in this to engage their customers, to drive campaign participation. Marketing managers have an opportunity to improve customer engagement when using MIM by applying the strategies presented in this study.

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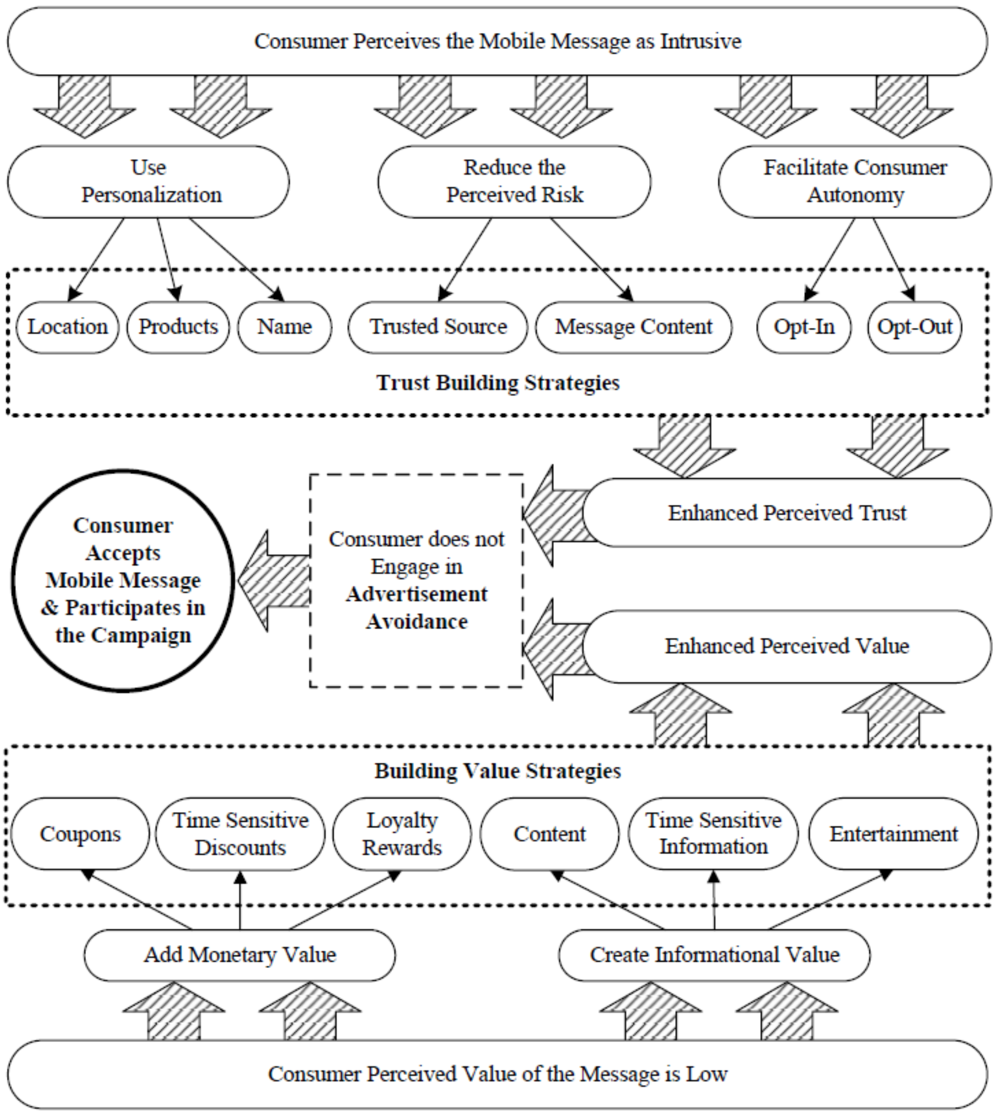
Appendix A: Themes from the Literature Review of Mobile Messaging Strategies



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Appendix C: Interview Protocols

Main Interview Protocol

What you will do	What you will say
Verify the receipt of the signed consent form email. If needed, follow up with the participant.	
Introduce the interview and set the stage—often over coffee Setup the recorders	“This is Phil Bailey on (date/time) meeting with (subject PIC) at (location).”
• Review the privacy of the study	“Any information you provide will be kept confidential. I will not use your personal information for any purposes outside of this research project. Also, I will not include your name or anything else identifying you in the study reports. Stored data will be encrypted with two-part encryption. The data is stored off-line. Data will be kept for a period of at least 5 years, as required by the university.”

• Review the right to exit the study	"This study is voluntary. Everyone will respect your preference of whether or not you choose to be in the study. No one will treat you differently if you decide not to be in the study. If you decide to join the study now, you can still change your mind later and withdraw at any time."
• Watch for non-verbal queues • Paraphrase as needed • Ask follow-up probing questions to get more in-depth. • Ask about possible records that are kept by the company related to the success of each strategy. • Ask about the existence of written processes and informal processes for each strategy.	1. What MIM strategies increase customer trust? 2. What MIM strategies reduce the customer's perception of risk associated with opening mobile messages? 3. What MIM strategies maximize customer perceptions of the usefulness of mobile messages? 4. What MIM strategies maximize the perceived ease-of-use in MIM? 5. What MIM strategies motivate consumers to engage?

	6. What MIM strategies increase the perceived value of mobile messages? 7. What are the barriers to implementing MIM strategies? 8. What other questions should I ask you about commercial MIM? 9. What strategies have you used that failed? 10. Are there other experiences related to MIM you would like to relate?
• Wrap up interview • Thank participant • Document identification	"Thank you so much for answering these questions."
• Schedule follow-up member checking interview • Record the date.	"When can we meet in two weeks to review my synthesis of your answers? It should take about an hour."

Follow-up Interview Protocol

What you will do	What you will say
• Review documents identified in the interview before the follow-up telephone call. • The meeting might be conducted via Zoom.us or telephone if necessary, but face-to-face is preferred. • Email the synthesis answers to each question to the participant at least 2 days before the call. • Set up the recording devices.	"This is Phil Bailey on (date/time) telephone call with (subject PIC).
• Review the privacy of the study	"Any information you provide will be kept confidential. I will not use your personal information for any purposes outside of this research project. Also, I will not include your name or anything else identifying you in the study reports. Stored data will be encrypted with two-part encryption. The data is stored off-

	line. Data will be kept for a period of at least 5 years, as required by the university."
• Review the right to exit the study	"This study is voluntary. Everyone will respect your preference of whether or not you choose to be in the study. No one will treat you differently if you decide not to be in the study. If you decide to join the study now, you can still change your mind later and withdraw at any time."
• Watch for non-verbal queues • Share a copy of the succinct synthesis for each individual question • Bring in probing questions related to other information you may have found— note the information must be related, so you are probing and adhering to the IRB approval.	1. Question: What MIM strategies increase customer trust? Review the synthesis. 2. Question: What MIM strategies reduce the customer's perception of risk associated with opening mobile messages? Review the synthesis. 3. Question: What MIM strategies maximize customer perceptions of

• Walkthrough each question, read the interpretation, and ask: Did I miss anything? Or, • What would you like to add?	the usefulness of mobile messages? Review the synthesis. 4. Question: What MIM strategies maximize the perceived ease-of-use in MIM? Review the synthesis. 5. Question: What MIM strategies have proven to motivate consumers to engage? Review the synthesis. 6. Question: What MIM strategies increase the perceived value of mobile messages? Review the synthesis. 7. Question: What are the barriers to implementing MIM strategies? Review the synthesis. 8. Question: What other questions should I ask you about commercial MIM? Review the synthesis. 9. Question: What strategies have you used that failed? Review the synthesis.

	10. Question: Are there other experiences related to MIM you would like to relate? Review the synthesis.
• Wrap up interview • Thank participant • Document identification	"Thank you so much for answering these questions.?"

Appendix D: Study Population Criteria

Each study participant met all the inclusion criteria and none of the exclusion criteria.

Inclusion Criteria

1. The participant must be a marketer conducting digital marketing in the Southeastern United States
2. The participant must have engaged in digital marketing campaigns, including MIM, to improve customer engagement.
3. The participant must have experience in developing digital marketing strategies.
4. The participant is over the age of 18 years.
5. The participant must have at least one year of marketing experience.
6. The participant must be a marketing manager or previously served as a marketing manager.
7. A participant must be able to give consent or withdraw consent for participation.

Script for Qualifying Volunteers

This script is used to qualify volunteers as possible participants in the study. This process occurs after site approval; after invitations are sent to employees at that site and in response to the email or phone call from the employee volunteering for the study.

“Hello! Do you mind answering a series of questions to determine if you might meet the study’s narrow qualifications? If yes, proceed.

1. Are you over the age of 18 years? If yes, proceed. If no, exit.

2. Do you have at least have one-year of marketing experience? If yes, proceed. If no, exit.
3. Have you served as a marketing manager, supervisor, or team lead? If yes, proceed. If no, exit.
4. Have you been involved in marketing to the Southeastern U.S.? If yes, proceed. If no, exit.
5. Have you participated in a marketing campaign using instant messaging as a marketing tool? If yes, proceed. If no, exit.
6. Have you developed developing digital marketing strategies? If yes, proceed. If no, exit.
7. Congratulations. You qualify for the study. I would like to send the Participant Consent Form and collect some basic contact information.

- What is your first and last name?
- What is your preferred email address to receive information about the study?
- What is your preferred telephone number for me to call you?

8. If you agree to participate, you can simply agree by replying to that email stating that you agree to participate.

EXIT

Thank you for volunteering for this study. The specifications are very limiting, and your experiences fall outside the focus of the study. Thank you again for volunteering.

Appendix E: Interview Questions

The interview questions for this study were:

1. What MIM strategies increase customer trust?
2. What MIM strategies reduce the customer's perception of risk associated with opening mobile messages?
3. What MIM strategies maximize customer perceptions of the usefulness of mobile messages?
4. What MIM strategies maximize the perceived ease-of-use in MIM?
5. What MIM strategies motivate consumers to open mobile messages?
6. What MIM strategies increase the perceived value of mobile messages?
7. What are the barriers to implementing MIM strategies?
8. What other questions should I ask you about commercial MIM?

Appendix F: Data Processing Protocol

The data in this study were drawn from three sources: Interviews, MIM provided by the participants, and synthesis of the interview responses. As the data was collected, the resulting documents must be properly identified, named, and stored. This protocol provided guidelines for naming and storing documents.

Interviews

- Name the recording PIC_InterviewRecording_Initial/followup-1/ followup-2.
- Upload the recordings to my computer into the encrypted folders.
- Transcribe the interview.
- Name the transcript PIC_Transcript_initial/followup-1/ followup-1/
- Upload the recordings to my computer into the encrypted folders.
- Verify the removal of all personal identification information from the transcript. Edit if necessary.

Corporate Documents

- Review documents captured in the interviews.
- Remove all the identifiable information. Assign PIC as the source.
- Photograph or scan the document.
- Name the file PIC_description_of_document.
- Upload the document to encrypted folders.
- Shred the original documents or return the documents to the company.

Synthesis Document

- Synthesize the responses to each question.
- Name the document PIC_SynthesizedResponses_Initial/Followup_1/Followup_2.
- Upload the document to encrypted folders.

Member Checking

Member checking enhances the validity of the study.

- The participant received the synthesized responses for review by the tenth business day from the interview.
- The participant reviewed the synthesis portion of the record. During member checking, the participant may review, correct, and expand the synthesis of their answers. The member checking process was repeated until the participant has no corrections or additions.
- I emailed the synthesis document to the participant for review.
- I received the revised document from the participant.

Appendix G: Data Storage and Protection Protocol

The objective of this protocol was to collect, store, and protect data, analysis, and findings of the project. Project files included editable files, emails, photographs, recordings, encrypted files, drawings, articles pertaining to the study, and databases.

1. Promote file organization by converting all files to an electronic format and stored in an electronic folder system.
2. File names assigned are as descriptive as possible with dates the files were created or captured.
3. I removed all identifiable data from the project files to promote the security of the participants.
4. The key to the personal identification codes and the completed informed consent forms were encrypted separately from the study data using a different encryption key.
5. I encrypted all project files using the CertainSafe Digital Safety Deposit Box software. Using this software system, I ensured only authorized persons have access to the dataset and project files.
6. I stored the encrypted files off-line, while active project files and data may be stored on a local computer.
7. Redundant copies of three or more for all files will be maintained throughout the project. I will maintain encrypted backups of all files. Unencrypted files were maintained on an external device while the research was in progress.

8. Documents separated from the larger whole project were sent via email for use by participants and reviewers.
9. The data files will be destroyed after 5 years by deleting the keys and files.