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Funding Sources and Marketing Strategies to Sustain Small-to-Midsized Nonprofit Businesses

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This is to certify that the doctoral study by

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Abstract

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MBA, Northcentral University, 2014

MS, University of Detroit Mercy, 1996

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Consulting Capstone Study Submitted in Partial Fulfillment

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Doctor of Business Administration

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Abstract

Ineffective funding sources and marketing strategies can negatively impact business sustainability. Half of all leaders of small-to-midsized businesses (SMBs) experience an inability to sustain their businesses for more than 5 years. Grounded in Greiner, Jablonski and Jablonski's and Mella and Pellicelli's sustainable growth models, the purpose of this qualitative single case study was to explore how leaders of an SMB developed funding sources and marketing strategies to sustain their business for more than 5 years. The participants comprised 3 leaders from a nonprofit SMB in the mid-Atlantic region of the United States. Data were collected from semistructured interviews, documents on performance outcome data, the information provided by the client leaders, and the organization's website data and information related to finances, budget, and market share. Thematic analysis was used to analyze the data. The emergent themes included community involvement, job stability, and marketing strategies. A key recommendation includes identifying useful funding sources and marketing strategies that leaders of SMBs can use to sustain their businesses for more than 5 years. Positive social change has implications for social and economic inclusion, health and well-being, and civic engagement through creating and maintaining jobs to provide income to people to improve quality of life and reduce unemployment.

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Dedication

To God, my Spiritual Father, without whose wisdom, guidance, and strength in my life, this doctoral study could not have been completed.

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Section 1: Foundation of the Study

Identifying funding sources and marketing strategies to sustain small-to-midsized nonprofit businesses remains a challenge. According to the U.S. Small Business Administration (2019), 50% of all establishments fail to stay in business more than 5 years, and 67% fail to remain in business more than 10 years. The high failure rate of SMBs is evidence of challenges to SMB leaders’ potential to contribute meaningfully to job creation, economic growth, and poverty reduction (Small Business & Entrepreneurship [SBE] Council, 2018). In several national and regional surveys across the globe, owners and managers of SMBs consistently rank access to funds as the number-one constraint to the growth of their companies **(**Esho & Verhoef, 2018). Often due to lack of financial means, leaders of SMBs neglect to implement marketing strategies, which can often lead to their marketing becoming progressively ineffective (Corak & Snajder, 2016). The goal of this study was to explore and identify what funding sources and marketing strategies leaders of nonprofit SMBs can use to sustain operations more than 5 years.

Background of the Problem

SMBs are a vital component of economic development in countries around the world. Leaders of SMBs contribute greatly to the economy of a country (Majama & Teddy Magang, 2017). However, leaders of SMBs characterized by low performance and high failure rate have experienced challenges in sustaining these businesses. Chief among these challenges is access to finance. Extant research and empirical evidence have established that SMB leaders lack access to adequate financing to fund their operations and growth, a widespread phenomenon referred to as the *funding gap* (Esho & Verhoef, 2018). Because of reluctance to spend scarce resources, often due to lack of financial means, SMB leaders neglect marketing, which causes their marketing to become progressively insufficient and ineffective; later, they implement strategies that failed and accrue additional costs (Corak & Snajder, 2016). Marketing has played a significant role in the life cycle of SMB growth.

Multiple researchers have investigated and explored materials and sources to establish facts and reach new ideas and conclusions regarding funding sources and marketing strategies that leaders of nonprofit SMBs can use to sustain their business more than 5 years (Bolos, Idemudia, Mai, Rasinghani, & Smith, 2016; Corak & Snajder, 2016; Esho & Verhoef, 2018; Izvercian, Miclea, & Potra, 2016; Khin, Chau, Chuan, & Tong, 2016; Machado, 2016; Mella & Pellicelli, 2015; Salwa, Sudarsan, & Radha, 2016; Nagarajan et al., 2017; Zabri, Yusoff, Ahmad, & Lean, 2017). The main supporting topics explored in this study include conceptual models, marketing strategies, customer relationship management, social media marketing, branding strategy, catering to the needs of in-store and online customers, diversification, customer experience, sustainability or green marketing strategy, and funding sources (Akram, Rana, & Bhatti, 2017; Alves, Fernandes, & Raposo, 2016; Dalle, Villiers, Za, & Mhlophe, 2015; Daniel, 2019; Gumus, 2017; Liargovas, Apostolopoulos, Pappas, & Kakouris, 2017; Nuseir, 2016; Rashid, Ghose, & Cohen, 2015; Vanharanta, Kantola, & Seikola, 2015; Verma & Mishra, 2017). SMBs characterized by low performance and a high failure rate have led to challenges in ensuring the survivability of these businesses (SBE Council, 2018).

Problem Statement

Leaders of SMBs struggle to sustain their businesses, as evidenced by 50% of SMBs failing to remain in business more than 5 years due to the inability of leaders to identify funding sources (Dilger, 2018). According to SBE Council (2018), 50% of SMB leaders fail to remain in business more than 5 years, and over 67% fail to stay in business more than 10 years. From a financial and marketing perspective, 31% of leaders of SMBs regard the inability to identify funding sources as the most significant obstacle to sustaining their business using an effective marketing strategy to make their businesses successful when income levels reach a state of little or no change (Wang, 2016). The general business problem was that some leaders of SMBs fail to sustain their businesses. The specific business problem was that some leaders of SMBs do not have funding sources and marketing strategies to maintain their company more than 5 years.

Purpose Statement

The purpose of this qualitative single-case study was to explore how leaders of SMBs develop funding sources and marketing strategies to sustain their businesses more than 5 years. The target population for this study comprised three leaders of a nonprofit SMB organization located in the mid-Atlantic region of the United States. The implications for positive social change include the potential identification of funding sources and marketing strategies to help SMB leaders sustain their businesses more than 5 years, thereby creating and maintaining jobs in local communities. By opening local jobs, leaders of SMBs can provide employment opportunities to people in local communities to provide income to improve quality of life. Leaders of profitable SMBs can also offer tax revenues to local communities for supporting services such as police, schools, and improving infrastructure.

Nature of the Study

There are three research methods: qualitative, quantitative, or mixed. Researchers use the qualitative approach to gain insights into a phenomenon to explore a topic (Kim, Sefcik, & Bradway, 2017). I chose a qualitative methodology to build a meaningful descriptive portrayal of the subject phenomenon. Quantitative researchers rely on the ability to anticipate measures in advance (Noyes et al., 2019). Because the purpose of this study was not to identify and compare specific variables, relationships, or groups' differences, a quantitative methodology was not appropriate. Mixed-method researchers collect and use both qualitative and quantitative data to address the research question (Dopp, Mundey, Beasley, Silovski, & Eisenberg, 2019). I did not choose the mixed methodology because I did not need to use the quantitative method to address the purpose of my study.

A qualitative case study design can be either single or multiple studies to provide a clear understanding of how best to proceed in addressing the problem (Yin, 2018). I chose a case study design because the focus of my study included one case that represented a typical SMB. Multiple case studies are studied by a researcher to understand the similarities and differences among the cases (Alpi & Evans, 2019). The focus of my research was to consult with a single client per required elements of the consulting capstone program. Walden University introduced the consulting capstone program in which individual students partner with a nonprofit organization or small business to gain valuable real-life and real-time experience while pursuing their doctoral degree. Students follow the Baldrige framework and criteria for performance excellence as an approach to improve a company's performance and achieve sustainable results; therefore, a multiple case study was not appropriate. Researchers use the phenomenological design to describe how human beings describe the meanings of personal experiences with a specific phenomenon (Bliss, 2016). The focus of my study was not to gain insight into the structure of how people understand their experiences; therefore, the phenomenological design was not appropriate. Researchers use the ethnographic design to gain insights into groups' cultures (Jones & Smith, 2017). The focus of this study was not about the cultural phenomenon; therefore, an ethnographic design was not appropriate. Researchers use the narrative design to focus on the lives of individuals, as told through their personal stories (McAlpine, 2016). The focus of this study did not link to the personal life histories of individuals; therefore, the narrative design was not appropriate.

Research Question

The research question: What funding sources and marketing strategies can leaders of nonprofit SMBs use to sustain their businesses more than 5 years?

Interview Questions

1. What key obstacles are you experiencing as a nonprofit organization that prevent you from funding your business?

2. How do you seek to affiliate with the local community for identifying and developing funding sources and marketing strategies to help sustain your business?

3. How, if at all, do you use the Internet or social media for marketing your organization?

4. How do your customers perceive the effectiveness of your current marketing strategies?

5. What funding sources are you currently using to finance your business?

6. What marketing strategies do you consider when looking for new business markets?

7. How do you currently assess the effectiveness of your funding and marketing strategies to support sustainability more than 5 years?

8. What else can you provide about funding sources and marketing strategies to sustain your businesses more than 5 years that we have not discussed?

Conceptual Framework

Greiner (1972) originally defined an organizational growth model in five life cycle phases and later added a sixth phase: (a) growth through creativity, (b) direction, (c) delegation, (d) coordination and monitoring, (e) collaboration, and (f) alliances (Waterhouse, 2017). Greiner suggested that leaders of organizations go through six phases of growth and need appropriate strategies and structures to address each stage.

Greiner’s growth model (GGM) is a descriptive framework for understanding why specific SMBs’ strategic plans, management styles, organizational structures, and coordination mechanisms work and why others do not work at certain phases of organizations’ development (Appendix A: Figure 3). Building on GGM, Jablonski and Jablonski (2016) supported that a sustainable business model could be used at periods of severe disorder in the functioning of an organization’s lifecycle in which the leaders of the company need to build and adapt the business model through suitable strategies to survive. The survival of the company is determined by the ability to modify the various phases of the business model life cycle by the application of appropriate solutions. At different stages of companies’ life cycles, leaders can review and, as needed, modify their business models with strategies for meeting the needs of their markets (Jablonski & Jablonski, 2016; Mella & Pellicelli, 2015; Appendix A, Figures 4 and 5). Greiner’s (1972) business growth model (Waterhouse, 2017), and Jablonski and Jablonski’s (2016), and Mella and Pellicelli’s (2015) assessments of sustainable business models align with this study’s purpose to identify and explore funding sources and marketing strategies that leaders of SMBs use to sustain their business longer than 5 years. Using multiphase business models is a useful way of thinking about and addressing the problems that organizations experience as they grow (Peric, Durkin, & Vitezic, 2017). By comprehending the multiphase business models, leaders of SMBs can understand the root causes of critical problems experienced in the different phases of a growing business.

The use of the chosen conceptual framework can strengthen this study by connecting existing knowledge to help leaders of SMBs identify and evaluate learning in different phases of the business model, which can guide toward improved performance with how the business creates, delivers, and captures value. I chose this selection of conceptual growth models for a leader's potential to facilitate an understanding of the study's findings. The business growth models reflect various researchers' facts, information, and skills acquired through experience or education and practical knowledge of the subject. The business growth models represented based on VBM can be helpful in change management when exploring business problems (Mella & Pellicelli, 2015).

Operational Definitions

A brief written description of important study terms and definitions follows — the meanings of the study terms are derived from the literature review.

Funding gap: The difference between the amount of funds companies require for operations and growth and the sum of funds that they receive (Esho & Verhoef, 2018).

Green marketing strategy: A strategic business plan of action or policy that refers to the process of selling products or services that are presumed to be environmentally safe (Daniel, 2019)

Marketing strategy: A business strategy or plan that refers to an action designed to promote and sell a product or service (Salwa et al., 2016).

Small-to-midsized businesses (SMBs): Employer firms with fewer than 500 workers that manage goods made, stored, or processed or in which services were rendered (SBE Council, 2018).

Sustainability: A requirement of a generation to manage the resource base, such as the average quality of life experienced, can potentially be shared by all future generations (Liargovas et al., 2017).

Value-based management (VBM): A managerial approach in which the primary purpose is long-term shareholder wealth maximation. The leaders' objective of a business, systems, strategy, processes, analytical techniques, performance measurements, and culture lead the way for shareholder wealth maximization (Mella & Pellicelli, 2015).

Assumptions, Limitations, and Delimitations

Assumptions

An assumption is an individual’s unexamined belief (Wolgemuth, Hicks, & Agosto, 2017). Assumptions at times are incorrect or misguided. Some leaders of SMBs assume they are constrained by their legal and business environment in their choice of finance (Esho & Verhoef, 2018). Because of these assumptions, even though formal sources are available, some leaders of SMBs prefer to use informal sources because of the complexities involved in using official sources. To investigate these assumptions, in-depth qualitative research linked to leaders’ real-life SMB funding experiences and comparative study by a network of scholars engaged in different contexts with different contextual conditions would be advantageous (Esho &Verhoef, 2018). Some researchers assume that findings from future research will aid in policy formulation and in easing the financing constraints of leaders of SMBs.

Limitations

The limitations of an investigator's study are constraints on generalizability, applications to practice, or utility of findings (Theofanidis & Fountouki, 2019). My research held significant barriers that deviate from the generalization of the results. One limitation is that the investigation was conducted as a qualitative single-case study with a target population that consisted of three leaders from a nonprofit SMB organization located in the mid-Atlantic region of the United States. Therefore, I cannot say that all participants in businesses around the country shared the same experiences and attitudes as the participants in this study.

A second limitation is that, despite theoretical developments in recent years, literature and understanding of financing preferences among leaders of SMBs are limited (Zabri et al., 2017). A small number of scholarly sources represents the existing knowledge of financing preferences for leaders of SMBs used to support this study. A third limitation is that few researchers have developed marketing models specific to small businesses. The model for marketing strategies for small businesses scenario has only been attempted in a limited number of studies (Salwa et al., 2016). Existing knowledge of marketing models represents a small number of scholarly sources used to support this study.

A fourth limitation is that the research information I included in this study considered the results of searches narrowed or performed through varied business, management, healthcare, and academic databases such as Business Source Complete, Google Scholar, and ResearchGate. Search terms related to SMBs were used: *conceptual models, marketing strategies, funding sources, customer relationship management, social media marketing, diversification, customer experience, branding strategies, and catering to the needs of in-store and online customers, and sustainability or green marketing strategy*. My literature review included articles in peer-reviewed academic journals, professional Weblog posts, and professional and academic conference proceedings. Complementary analyses, including other databases, would be necessary to confirm the conclusions in my study.

Delimitations

The delimitations of an investigator's study are those characteristics that limit the scope and define the boundaries of the study (Theofanidis & Fountouki, 2019). Survey researchers have shown that leaders of SMBs who make and enhance their existing products with the idea of their environmental safety are in better condition than those who have little or no regard for the environment (Daniel, 2019). From an environmental health and safety standpoint, leaders are responsible for inspecting and evaluating the environment equipment and processes in working areas to ensure compliance with government safety regulations and industry standards. A crucial reason for leaders' compliance with regulatory requirements is to protect employees, customers, and the environment. Leaders who protect the employees, customers, and the environment experience ease of access venturing into new markets, overall competitive advantage over other leaders of SMBs, and profit sustainability (Daniel, 2019). However, there is no central government plan to help leaders of SMBs with green marketing. According to Biswas and Roy (2016), product price, availability, performance, and quality have the highest motivating force on consumers' intention to purchase the product at a higher price for what they perceive as value for the money and contributing to the care of the environment. Leaders of SMBs are not well informed about the foundation and motivations of the process of selling products or services presumed to be environmentally safe imparted from governments all over the world and the European Union (Daniel, 2019). For that reason, SMB leaders do not take advantage of the benefits of green marketing, which involves meeting buyers' expectations, strengthening customer loyalty, improving business reputation, creating a healthier workplace environment, saving money, and taking advantage of available tax benefits. Thus, the scope of my research did not include detailed questions regarding the incorporation of selling products or services presumed to be environmentally safe in business sustainability or green marketing strategy.

Significance of the Study

Contribution to Business Practice

The results of my study might contribute to the potential identification of fruitful funding sources and marketing strategies for leaders of SMBs to use to sustain their businesses more than 5 years. The identification of useful funding sources and marketing strategies can benefit SMB leaders' strategic planning and enable leaders to increase business performance through maintaining and growing relevant stakeholder groups' support to increase SMBs sustainability more than 5 years.

Implications for Social Change

The implications for social change that could result from the findings of this study include social and economic inclusion, health and well-being, and civic engagement. Regarding social and financial integration, an increased understanding by SMB leaders of what funding sources and marketing strategies are available to sustain their business more than 5 years might support job creation in local communities and reduce unemployment. By identifying funding sources and marketing strategies to help SMBs, leaders sustain their business; leaders can create and maintain jobs to provide income to people to improve quality of life. The empowerment and enablement of marginalized groups of people could result from building workforce skills to people in local communities. Improved health and well-being could result from employing people in the local communities through improved access to better healthcare. Increased civic engagement could result from providing income to people in local communities through responsible investing and charitable giving.

A Review of the Professional and Academic Literature

The development of this comprehensive literature review included the review of current scholarly knowledge, substantive findings, as well as conceptual models and methodologies. The research included the results of searches performed through various business, management, healthcare, and academic databases such as Business Source Complete, Google Scholar, and ResearchGate. Search terms related to SMBs were used: *conceptual models, marketing strategies, funding sources, customer relationship* *management, social media marketing, diversification, customer experience, branding strategies, and catering to the needs of in-store and online customers, and sustainability or green marketing strategy*. My literature review included articles in peer-reviewed academic journals, professional Weblog posts, and professional and academic conference proceedings.

Organization of the Literature Review

I organized the literature review to show applicable data explored about leaders of some SMBs who have struggled to sustain their business due to a lack of funding sources and marketing strategies to maintain their companies more than 5 years. I included concepts in this literature review that identified various funding sources and marketing strategies to help leaders of SMBs sustain their businesses. I included supporting concept topics, which revealed current literature and data describing SMBs and large companies operating results that could be highly dependent on strategic funding sources and marketing strategies. The main issues I explore in this literature review include *conceptual models, marketing strategies, customer relationship management, social media marketing, branding strategy, catering to the needs of in-store and on-line customers, diversification, customer experience, sustainability, green marketing strategy, and funding sources.*

Strategy of literature search. This literature review included topics that contribute to understanding the study's research question: What funding sources and marketing strategies can leaders of nonprofit SMBs use to sustain their businesses more than 5 years? I explored information on conceptual business growth models in their lifecycle. There was a need to define sustainable theoretical business models that might help leaders of SMBs position appropriate business strategies to achieve long-term success. By understanding the business growth models, leaders of SMBs can identify the root cause of problems with their operations and work toward correcting or preventing those problems. Various materials were investigated and studied as sources to establish facts and contribute to new ideas and conclusions.

Marketing strategies were another critical focus because such plans have an impact on firms’ sales performance. The effective use of leaders' marketing strategies increases sales (Saif & Aimin, 2016). The effective use of leaders' marketing strategies increases sales and give leaders of SMBs a competitive edge in the market, helping them achieve their business goals. Marketing approaches for leaders of SMBs allow the opportunity to gain insight into marketing strategies that result in increased income.

From a financial perspective, leaders of SMBs have experienced a lack of funding sources, which has led to a high failure rate. This literature review can enhance the understanding of business practices among leaders of SMBs by making them aware of successful financial practices or funding sources. The study includes 180 references cited, of which 96% published between 2016 and 2020, and 100% of journal articles were peer-reviewed.

Conceptual Models

Researchers explored the conceptual growth models of SMBs and large businesses. I used the researchers’ studies of large companies due to the lack of examples in the literature of SMB growth models. The growth models reflect various researchers’ facts, information, and skills acquired through experience or education and practical understanding of the subject. The growth models represented are based on VBM, which can be helpful in change management when examining problems in a business. VBM is a managerial approach in which the primary purpose is long-term shareholder wealth maximation. The leaders' objective of a company, systems, strategy, processes, analytical techniques, performance measurements, and culture lead the way for shareholder wealth maximization (Mella & Pellicelli, 2015). Various researchers have emphasized VBM by focusing on how companies use VBM to make both strategic and operating decisions. Properly planned and implemented, VBM can be an approach to management that aligns a company's vision, analytical techniques, and management processes to focus decision making on the critical drivers of value. Leaders of SMBs who struggle to sustain their businesses more than 5 years might use these business growth models as a strategy.

Greiner's growth model. The first conceptual model discussed was GGM (as cited in Waterhouse, 2017). Greiner, through his research, identified six phases and five predicted crises a business may go through as it matures. The six stages of growth and five predicted crises include (a) creativity, (b) direction, (c) delegation, (d) coordination, (e) collaboration, and (f) alliances. In the first phase, growth through creativity refers to business leaders creating products and opening markets. Founding leaders who founded the company are busy creating products and opening up markets. There are few staff members, and informal communication is the norm, and rewards for long hours might be through profit sharing or stock options. However, as more staff join, production expands, and capital is acquired; thus, there could be a need for formal communications. The second phase is growth through direction, in which professional management might be needed to manage budgets and focus on separate activities such as marketing and production. The leaders of the business may take on this role or will hire new employees. At this phase, a company might experience its initial crisis, a *crisis of leadership*, in which informal communication starts to fail, and the company is too big for the leader to manage and control. In the third phase, growth through delegation, the organization continues to grow; senior leaders monitor and address significant issues such as merger or acquisition opportunities. Leaders struggle with their new roles as leaders. At this phase, a business might experience its next crisis, a *crisis of autonomy*. The company has functional management, but the leaders are still struggling to let go of control. In the fourth phase–growth through coordination–growth continues with the previously separated business units restructured into product groups or service practices. A sophisticated head office function is required, and the separate parts of the business need to work together. Investment finance is allocated centrally and managed according to return on investment and not just profits. Also, work becomes submerged; vital decisions about the business are made by government officials such as legal framework (the making and enforcement of contracts) and the services needed for a market economy to operate effectively. At this phase, a business might experience its third crisis, a *crisis of control*, in which formal management structures are in place, but new layers of hierarchy are needed to keep control. In the fifth phase, growth through collaboration, the business is engaged in a struggle for survival and further growth. Company leaders attempt to lighten the bureaucratic burden by encouraging various organizational bodies to collaborate and accept personal responsibility using an appropriate system of incentives to achieve greater regulatory flexibility. Leaders are encouraged to attain regulatory consensus by the stakeholders. Collaboration produces new ideas and innovations. The informal structure prevails over the bureaucratic structure. Further growth can only come by developing partnerships with complementary businesses. At this phase, a business might experience its fourth crisis, a *crisis of red tape,* in which dangerous growth occurs in company bureaucracy, slow decision-making, and obsolete external changes. The last phase, the sixth phase, is growth through alliances or extra-organizational solutions: Growth may continue through mergers, outsourcing, networks, and other solutions involving other companies. In this phase, a business might experience its fifth crisis, a *crisis of growth,* in which growth slows as leaders of the industry run out of ideas, and alliances are sought (including new business owners).

GGM (as cited in Waterhouse, 2017) makes it simpler to understand why management styles, business structures, and coordination mechanisms work, and why chaos may exist at certain phases in the development phase of a business. While business is within a stage, it is a time of relative stability. However, every step might unavoidably lead to a crisis point that forces the company to transform. Learning plays a vital role in helping leaders and employees make these transitions successfully. Companies go through these phases at different speeds. By identifying what stage a company is in, SMB leaders can uncover what learnings are essential and prepare for what learnings will help the company to transform successfully. See Appendix A, Figure 3 for GGM and the six phases and five predicted crises that leaders of SMBs go through as a business matures.

Business sustainability typology. The second conceptual model, discussed by Jablonski and Jablonski (2016), presented the results of theoretical discussions and research findings in the field of designing sustainable business models built upon GGM, which supports VBM at various stages of the business life cycle. Leaders of businesses that are at different stages of development can build and adapt their business models to create value for stakeholders. Characteristics in business models in the context of the life cycle of businesses and sustainability criteria appropriate for the early stage of development are different from the maturity stage. Jablonski and Jablonski found that the business models of companies at an early stage are oriented to how the company shapes, delivers, and captures value from the market to generate profits for shareholders and increase the value of the company. At the early stage, it is crucial to adapt the business model to create value for shareholders by actively searching for the optimal configuration of the business model. At this point, a component approach to making rapid changes in the structure of the business model is essential. At the early stage of development, the business model strengthens the need to create value for shareholders and is not as dependent on strong partnerships with many stakeholders.

Business models of mature companies include the intentions of management to balance objectives concerning different groups of stakeholders and to carefully formulate and implement business objectives with attention paid to preserving the sustainability of the business. From the viewpoint of the life cycle, it proves that managers change their approach to configuring business models over time; at some point, they include management intentions aimed at a broader range of goals than merely generating profits

(Jablonski & Jablonski, 2016). At the maturity stage, it is crucial to balance the objectives of all stakeholders and to build long-term relationships with them concerning the environment and business model sustainability, which is a critical determinant of doing business. A business leader's challenge is to win the trust of stakeholders. The leaders who win are those who are committed to value creation and communicate well and often assess their performance. The business model of leaders in mature companies' assumptions is ensuring the long-term viability of the business. When the leader moves the company from the stage of early development to the maturity stage, business models change in such a way that the assumptions of the triple bottom line (TBL) concept become increasingly important. The TBL is composed of three parts: social, environmental, and financial, which is expressed in the joint implementation of corporate social sustainability and VBM assumptions (Jablonski & Jablonski, 2016). The key concept underlying the concept of sustainability is related to the fundamental nature of knowledge concerning the TBL, which increases the opportunities for a leader's survival in various conditions. See Appendix A, Figure 4, for a sustainable business model as a new way of ensuring business sustainability.

Other conceptual models. Other conceptual models that support VBM discussed, for example, the firm as a cognitive system for efficient transformation by Mella and Pellicelli (2015). The researchers identified factors external and internal to growing businesses that make it unavoidable to change the traditional managerial perspective from profit maximization in favor of a new approach that views the production of shareholder value. The basic theory is that VBM does not respond to tendencies in the capital market (financial transformer) that reward leaders of companies with higher profits, but instead is the result of intrinsic needs in expanding organizations (Mella & Pellicelli, 2015). For example, as companies grow in size and complexity, and as the formation of diversified business portfolios becomes more frequent, it becomes natural and unavoidable to introduce VBM as a conventional management approach, as noted in Table 1.

Table 1

Mella and Pellicelli's Assumption of Sources and Explanation of Need Considerations

Assumption of Sources	Explanation of need Considerations
(1) the stimulus of economic growth	Refers to management continually searching for new capital to finance new opportunities, and this leads to continuous pressure to come up with funding sources that give value to the invested capital.
(2) the genesis of the managerial business and the separation of ownership and control	Refer to essential decision agents who do not reap a worthwhile share of wealth from the effects of their decisions. The corporate enterprise is no longer headed by an individual capitalist entrepreneur but by a board of directors and a structure of functional managers. The board of directors given authority to manage the business if it can guarantee or fulfill the expectations of return on capital for shareholders; this avoidably moves toward a value-based approach. VBM changes the composition of the businesses in the portfolio, abandoning low-profit ones for new ones with higher returns. This explanation of the birth of VBM presents elements that are based on factors external to the business, even though more emphasis placed on internal factors such as the managerial approach. External factors might include competition, social, legal and technological changes, and the economic and political environment.
(3) Flamholtz's growth model (as cited in Mella & Pellicelli, 2015), considers five phases of growth:	(a) *The start-up* refers to a new business run by a single owner who wants to develop a business idea. (b) *Growth/expansion* refers to the company undergoing a noticeable size growth, and new resources are acquired and procedures redefined to obtain adequate levels of efficiency to meet the growing demand. (c) *Managerialization* is where businesses quickly gain new clients with new needs to satisfy which new products created that require new technologies and an increased labor force. Also, with an increase in size, management of revenue, personnel, managerial, and administrative complexity exists. (d) *Consolidation* or the "great leap" refers to a separation, a revolution, which leads to a radical change is the way a business run. The "great

	leap" helps to understand the need for an improvement in management but not the shift from an advanced (in the traditional sense) management approach to a value-based one. (e) *Depersonalization* refers to the continuation of growth, where the capital required to finance new investments will be higher than the original capitalist entrepreneur's financial means. The business must be transformed from a family-run operation to a financial one by undergoing a depersonalization process that separates capital from management.
(4) GGM (as cited in Waterhouse, 2017), as previously discussed, considers six phases and five predicted crises a business may go through as they mature:	See pp. 16-18 and Appendix A, Figure 3 for GGM (as cited in Waterhouse, 2017) and the six phases and five predicted crises that every business goes through as it matures.
(5) Mella and Pellicelli's (2015) growth model is used to explain the operating logic of value-based management in capitalist businesses. It assumes that the capitalist market undergoes five types of transformation:	The five examples of change include: (a) Technical or productive change (production) where the productive change of making or manufacturing from components or raw materials characterized by the productivity of the processes and the quality of the products. (b) Economic or market transformation (marketing) refers to the productive change of a business promoting and selling products or services, including market research and advertising, with the addition of the prices of the factors which become the transformation of values. (c) Economic change (finance) is a transformation of risk through investments. To carry out the economic transition the business must raise capital to finance capital investments to form, maintain and renew the productive structure; and (d) Managerial change (planning and controlling), refers to the core of managerial change which is the set of logical administrative decisions that manipulate, and control, in no small measure, the relevant variables that affect business performance such as production, marketing and finance on how to transform the strategic objectives of shareholder value into a coherent and achievable business system of decisions that function according to value drivers and key performance indicators; and (e) Entrepreneurial transformation (strategy) involves the formulation and implementation of the primary goals and initiatives taken by a business top management on behalf of owners such as the portfolio of business to manage, the technology, the markets, the prices, and the financial structure to produce maximum shareholders and stakeholders value which subjected to a system of corporate governance that operate in an external environment. See Appendix A, Figure 5, for the business as a cognitive system for efficient transformation.

From Mella, P., & Pellicelli, M. (2015). The origin of value-based management: Five interpretative models of an unavoidable evolution. *The International Journal of Knowledge, Culture and Change Management, 8,* 1-16. doi:10.18848/1447-9524/cgp/v08i02/50507

Mella and Pellicelli (2015) asserted a business growth model as the connection between profitability and the production of business value; the researchers emphasized that the creation of value does not depend on the management method adopted but instead a phenomenon that is deeply rooted in the structure of the capitalist firm. The basic statement conveyed was that VBM does not respond to tendencies in the capital market, which reward companies with higher profits, but instead is the result of intrinsic needs in expanding organizations. The researchers explained five interpretive models of an unavoidable evolution (Table 1).

Mella and Pellicelli (2015) explained the need to change a leader's management style as a company grows in size and complexity by introducing value metrics and value drivers to make explicit and to control the natural process of value production. The researchers asserted how some business growth models allow the identification of a phase in which VBM is a necessity. In the Flamholtz's growth model, this occurs during the great managerial leap in stage five. In contrast, in GGM, it coincides with the growth linked to extraorganizational recombination in stage six (as cited in Mella & Pellicelli, 2015). Therefore, the conclusion was that VBM appears not so much as a discretional approach for virtuous business but rather as an unavoidable requirement for all capitalist firms moving into the managerial phase, which leads to relative financial independence to the traditional single-owner model.

Machado (2016) emphasized that theories developed to explain the growth of large companies are not adapted to explain the phenomenon in small companies. Still, growth is essential for the survival of small businesses. A literature review was conducted in 16 journals of *Entrepreneurship and Small Business Management*, in the national search portal *Spell*, and a brief survey on scientific production, mainly within the last 15 years. This study contained the comprehensive work of many authors and researchers to identify and understand the growth of small companies. Machado's (2016) analysis of publications revealed how the growth phenomenon had dealt with through its former and consequences. The characteristics of the old may contribute towards the growth and may comprise schooling level and experience (within the sector, with other enterprises, previous successful experiences); position in the personal carrier, insertion within social and other networks; age; fear of failure; personal aims and internal locus of control; growth aspirations and previous growth aspirations; motivations, and growth intentions; the equilibrium between work and family. More, the businesses characteristics or activities may also induce growth, such as size and age of the enterprise; choice of the site; learning and experience; mission and commitment with growth; innovation and development in products and services; hiring of consultants; development of management competences; strategies in human resources and marketing strategies; networks and joint ventures with suppliers; exports and internationalization; type of business (franchising); fusions, acquisitions, joint ventures, and strategic alliances. Several setting characteristics also revealed a positive influence on the growth of small enterprises, such as supply-and-demand conditions; dynamics of the sector and entrance impairments; investors and venture capital; universities and mechanisms for the transference of technology; availability and facility of access to human resources and prime matter; the importance of stakeholders and family ties; networks, alliances and enterprise networks, public policies and national and local programs subsidizing the firms.

In summary, I presented in this literature review conceptual growth models viewed through the lens of different researchers' analyses of SMBs and large businesses. I presented studies of large companies due to the lack of examples in the literature of SMB growth models. Even though theories developed explained the growth of large companies and are not adapted to explain the phenomenon in small companies, growth is essential for the survival of small businesses. The first conceptual model discussed was Larry GGM (as cited in Waterhouse, 2017). See Appendix A, Figure 3 for GGM (as cited in Waterhouse, 2017), and the six phases and five predicted crises that every business goes through as it matures.

The second conceptual model discussed was Business Sustainability: Typology with key characteristics and changes (Jablonski & Jablonski, 2016), a sustainable business model as a new way of ensuring business sustainability in Appendix A, Figure 4. Also, the origin of value-based management: Five interpretative models of an unavoidable evolution (Mella & Pellicelli, 2015), the business as a cognitive system for efficient transformation in Appendix A, Figure 5.

Last, Machado (2016) emphasized that theories developed to explain the growth of large companies are not adapted to explain the phenomenon in small companies. Growth is essential for the survival of small businesses. A literature review was conducted in 16 journals of *Entrepreneurship and Small Business Management*, in the national search portal *Spell*, and a brief survey on scientific production, mainly within the last 15 years. This study contained the comprehensive work of many authors or researchers to identify and understand the growth of small companies.

Marketing Strategies

The organization of literature on marketing strategy has been conceptualized mainly under three parts, theoretical background of the subject, various dimensions of marketing strategy, and discussions of factors to be considered while formulating marketing strategy (Salwa et al., 2016). First, regarding theoretical background and definitions, marketing strategy theories and descriptions are a broad concept, defined and conceptualized in different ways by different authors. The definition of marketing strategy is a business strategy or plan that refers to an action designed to promote and sell a product or service (Salwa et al., 2016). A Leader's marketing strategy is how marketing goals planned and achieved. In this study, various theories of marketing strategies discussed.

Second, as for the various dimensions of marketing strategy, the fundamental aspects of marketing strategy are the product, pricing, place, and promotional marketing mix elements when designed to work effectively is a source of competitive advantage for the business. Saif and Aimin (2016) suggested there is a relationship between marketing strategy and marketing mix elements on business performance. A leader's marketing and executing marketing strategy represents a crucial element of success for businesses. Through marketing and strategy implementation, leaders employ scarce resources through marketing capabilities to achieve set goals and targets. Saif and Aimin (2016) revealed two distinct but related features to a leader's marketing strategy content:

marketing strategy decisions and marketing strategy decision implementation. The appropriate and effectively implemented marketing strategies by leaders are required to productively guide the deployment of limited available resources by the leader's business marketing capabilities in pursuit of desired goals and objectives. A marketing strategy content, therefore, involves the leader’s explicit and implicit decisions regarding goal setting, target market selection, a positional advantage to be pursued, and timing to attain firm performance. The leader’s choice of marketing strategy content determines which specific resources and capabilities are required to be combined and transformed to develop and deliver the value offering that consequently leads to firm performance. According to Saif and Aimin (2016), a leader’s complication is to realize the fact that many goal criteria and levels may be incompatible or at least noncomplementary in the pursuit of achieving firm performance. Revenue and margin growth may be challenging to meet at the same time. Leaders, therefore, must prioritize potentially conflicting objectives. According to Saif and Aimin (2016), leaders of businesses can achieve long-term performance by directing their marketing activities on what everyone wants rather than worrying about the particulars of what everyone thinks they might like, which can be costly to cater when following individual preferences.

The marketing of goods or services is the ultimate objective of a leader’s goals for all types of companies. A leader’s marketing strategy contributes to the development of the business. The leader’s application of proper marketing strategies catches up the sustainable growth of firms. Intelligent leaders of companies develop their business by applying adequate marketing strategy, but leaders of impoverished firms fail to do so. For example, the leaders of the SMB sector have been identified as necessary in the overall policy objectives of the government of Sri Lanka and seen as a driver of change for inclusive economic growth, regional development, employment generation, and poverty reduction. Sathana, Velnampy, and Rajumesh (2018) developed a conceptual model for leaders' proper marketing strategies for the development of SMBs in Northern Province in the postwar market. Empirically suggested and tested leader strategies for SMBs were green marketing strategy, strategy, competitive strategy, relationship marketing strategy, innovative marketing strategy, market-oriented strategy, and cost controlling oriented approach. Sathana et al. (2018) have suggested five significant strategies for leaders: competitive marketing strategy, relationship marketing strategy, social network marketing strategy, related diversification, and green marketing strategy for the development of leaders of SMBs in the postwar frontier market.

In this study, I supported Sathana et al.’s (2018) marketing strategy model and built upon it to include two other marketing strategies for the development of SMBs. The two additional marketing strategies include (a) branding strategy, and (b) customer experience. As to competitive marketing strategy, it is a long-term plan aimed at creating a defensive position in the industry and generating a high return on investment. As far as a relationship marketing strategy, it is a plan that attempts to involve and integrate customers, suppliers, and other infrastructural partners into a firm’s developmental and marketing activities. Sophisticated technology applications like computers and telecommunications allow producers to interact with the customers. As regards to social network marketing strategy, it is a plan to build awareness for the leaders of business and grow following on social media. Related diversification drives a leader's high performance in midsized companies. As regards to green marketing strategy, it is a plan of action or policy that refers to the process of selling products or services that are presumed to be environmentally safe. A leader's environmental marketing strategy can represent promising opportunities for value creation and market growth. A leader's branding strategy refers to a long-term plan for the development of a successful brand to achieve specific goals. A leader's well-defined and executed branding strategy affects all aspects of a business and connects to consumer needs, emotions, and competitive environments. Customer experience refers to an interaction between a company's staff and a customer throughout the relationship. Sathana et al.'s (2018) proposed conceptual framework, including the potential of two additional marketing strategies (a) branding strategy, and (b) customer experience offers a unique business strategy to the competitive advantage of SMBs.

Third, relating to the factors to be considered while formulating a marketing strategy, marketing strategy has attracted numerous contributions from researchers and practitioners that attempt to develop frameworks for strategy formulation, antecedents of marketing strategy and factors mediating strategy and its outcomes. Formulation of marketing strategy that ensemble the marketing environment is crucial to leaders of SMBs for sustainability, particularly in the era of the competitive business environment (Salwa et al., 2016). Leaders can use models and frameworks for the strategy formulation process for analysis of business portfolio such as Porter's five force model which include (a) threat of new entrants, (b) rivalry among existing firms, (c) the risk of substitute products/service, (d) the bargaining power of suppliers, and (e) the bargaining power of buyers in the market. Another model is strength, weakness, opportunity, and threat (SWOT) analysis.

In summary, the organization of literature on marketing strategy has been conceptualized mainly under three parts, theoretical background of the subject, various dimensions of marketing strategy, and discussions of factors to be considered while formulating marketing strategy (Salwa et al., 2016). The definition of marketing strategy is a business strategy or plan that refers to an action designed to promote and sell a product or service (Salwa et al., 2016). Various theories of marketing strategies discussed (Saif & Aimin, 2016; Salwa et al., 2016; Sathana et al., 2018). The marketing strategy used to help leaders of SMBs achieve their goals.

Customer relationship management and marketing strategy. The strategic plan of business leaders is to find customers and convince them to purchase the product or service offered, or businesses would no longer exist. Innovators' recent advancements in technology have created new opportunities to attract customers using electronic marketing (e-marketing). E-marketing draws from traditional marketing principles while also expanding the type of strategies available to companies. Websites, social media, and online marketplaces are some examples of how leaders of businesses are leveraging e-marketing approaches to link with new customers. In formulating sound e-marketing strategies, some factors for leaders of companies to consider include methods for identifying and attracting the target market population, engaging customers, making the case to bring them to the point of sale, and tracking metrics that indicate which approaches are making the most significant financial and non-financial impacts on the return of investment.

Bolos et al. (2016) inferred that leaders of businesses that modify their marketing strategies to meet the needs of their customers would have a competitive advantage over firms that continue to utilize traditional marketing methods only. The purpose of a leader developing a marketing strategy is to detail how to enter a company into the market, attract new customers, and create consumer interest that later translates into sales. The success of the effectiveness of the leader's marketing strategy, therefore, is measured by how much it can engage a consumer's decision to purchase the leader's products and services. To quantify the e-marketing result, leaders of businesses must set specific, measurable goals that align with business objectives that will set the stage for managing according to those measurements and provide a plan for future investments. Although there are no regular standards used for benchmarking methods and measuring e-marketing effectiveness, metrics like click-through rates, conversion rates, and repeat customers provide insights and understanding from data that is relevant to managers and ultimately the e-marketing return on the investment. For example, Khin et al. (2016) identified that leaders' product commitment and product homogeneity have a significant relationship with the click-through rate of online marketing link. The online process simplicity and online purchase complexity, cyberculture effect, and the need satisfaction have a meaningful relationship of a fully mediating force between the click-through rate of online marketing link. Perceived risk was the online payment gateway, which exposed buyers to the potential risk of having private information stolen.

A leader's applications of marketing have become mandatory and the need for implementation of a common strategy. Any strategy, including the implementation of the marketing strategy, should be preceded by thorough market research and situation in general (Corak & Snajder, 2016). Several leaders of businesses, institutions, and others neglect this critical step because of hesitation to spend scarce resources, which can lead to implementing some ineffective strategies which later often fail and incur additional costs. A leader's implementation of marketing on the Internet environment today means an advantage over the competition and gain the trust of the broader aspects of the customers. Marketing plays a significant role in the life cycle of any business. Leaders of companies in the economy often due to lack of financial means "fail to implement" they neglect marketing which can often lead to marketing becoming progressively ineffective because regardless of the quality of product or service offered if the potential buyer is not aware of the offer and condition to sales process will not come. Izvercian et al. (2016) argued that not only does lack of financial resources lead SMBs leaders to an ineffective strategic marketing plan, but also the lack of openness to marketing orientation and marketing research. An understanding of marketing orientation and research principles can help leaders of SMBs create successful strategic marketing plans. According to Izvercian et al. (2016), a solution for SMBs leaders is to seek external partners from business or university environment. Together they can create interdisciplinary teams, which can diagnose the leader's marketing potential of an SMB. Tools used to diagnose the leader's marketing potential of an SMB include a customized process and an appropriate marketing strategy (taking into consideration the available financial and human resources and the company's business environment).

In summary, the strategic plan of business leaders is to find customers and convince them to purchase the product or service offered, or businesses would no longer exist. Innovators' recent advancements in technology have created new opportunities to attract customers using electronic marketing (e-marketing). Bolos et al. (2016) inferred that leaders of businesses that modify their marketing strategies to meet the needs of their customers would have a competitive advantage over firms that continue to use traditional marketing methods only. The purpose of a leader developing a marketing strategy is to detail how to enter a company into the market, attract new customers, and create consumer interest that later translates into sales. A leader's applications of marketing have become almost mandatory and the need for implementation of a common strategy. Any strategy, including the implementation of the marketing strategy, should be preceded by thorough market research (Corak & Snajder, 2016). Several leaders of businesses, institutions, and others neglect this critical step because of hesitation to spend scarce resources, which can lead to implementing some ineffective strategies which later often fail and incur additional costs.

A leader's understanding of marketing orientation and research principles can lead to successful strategic marketing plans. According to Izvercian et al. (2016), a solution for SMBs leaders is to seek external partners from business or university environment. Together they can create interdisciplinary teams, which can diagnose the leader's marketing potential of an SMB with the following tools: a customized process and an appropriate marketing strategy (taking into consideration the available financial and human resources and the company's business environment).

Social media marketing. Customer relationship management and social media have an impact on sales performance. According to Akram et al. (2017), findings showed that customer relationship management increases sales. Also, social media and sales personnel capabilities have a critical relation to sales performance. According to Alves et al. (2016), findings demonstrated how most of the authors' studies focused on the consumer perspective in terms of usage, share, and influence of social media on consumer decisions and perceptions. Different authors' studies focused on the firm's perspective centered not only on the usage of social media but on the leader's implementation, optimization, and measurement of results. Many of the different authors' studies published were quantitative. The outcome of Alves et al. (2016) study showed that most studies previously focused either on analyzing the consumer perspective on social media marketing to perceive how they react to these means or on how companies can abstract the maximum possible value from recourse to such channels for managing relationships with clients. However, more authors' studies are necessary to explore the perspectives of companies as they engage in social media marketing, especially in terms of understanding the key barriers and obstacles to their usage.

According to Gumus (2017), followers tracked leaders' brands on social media primarily to keep an eye on new products and designs of leading brands to take advantage of leader brand opportunities such as discounts, campaigns, and sweepstakes. Also, unrelated content, advertisements related to other leader's leading brands and products, and content considered to be political, ideological, funny, and entertaining. were deemed to be unfavorable by followers. The advantage of the presence on social media for leaders’ leading brands is on creative content that will influence the target audience directly. Creating a presence on social media involves leaders of brands defining an audience of followers and then creating content in line with the expectation of the audience. Further, leaders of brands share sincere and communication-oriented message content instead of a formal language with an audience of followers on social media channels, which are social environments. Leaders must receive feedback regarding this shared content in terms of measuring success and the possibility of revising content. Moreover, followers tracked leader brands on social media who looked for answers regarding which kinds of content to release.

In summary, customer relationship management and social media have an impact on sales performance. According to Akram et al. (2017), findings showed that customer relationship management increases sales. Also, social media and sales personnel capabilities have a critical relation to sales performance. According to Alves et al. (2016), findings demonstrated how most of the authors’ studies focused on the consumer perspective in terms of usage, share, and influence of social media on consumer decisions and perceptions. Different authors’ studies focused on the firm’s perspective centered not only on the usage of social media, but on the leader’s implementation, optimization, and measurement of results. According to Gumus (2017), followers tracked leaders’ brands on social media primarily to keep an eye on new products and designs of leader’s leading brands to take advantage of leader brand opportunities such as discounts, campaigns, and sweepstakes. Also, unrelated content, advertisements related to other leader's leading brands and products, and content considered to be political, ideological, funny, and engaging deemed to be unfavorable by followers.

Branding strategy and catering. Branding strategy and catering to the needs of in-store and online customers, according to Verma and Mishra (2017), leaders' brand image built by spreading cognizance of sensory branding and its aftereffect on consumer purchase behavior. A leader's making of a strong brand will shift from two senses (hearing and sight) method to the multisensory approach (smell, sound, sight, taste, or touch). The multisensory approach directs on the human five senses to respond to understanding expectations from the customers. Each leaders' brand creates strong memories in customers' minds by appealing to all five senses. Appealing to all five senses leads to a secure connection among leaders' brands and customers, which further results in brand loyalty. Leaders who build strong sensory branding create a brand on an emotional level by using all the five senses in the purchasing procedure to give an unforgettable experience to the customer. Customers' brand experience is feelings, emotional state, opinions, and behavioral responses aroused by the human five senses. The more consumers implicate with all five senses, they will be able to reminisce the brand more; as a result, it leads to satisfaction and loyalty among customers.

Regarding marketing, leaders must build brand image uniqueness (Verma & Mishra, 2017). A leader's brand identity is a fundamental resource of consumer recognition and signifies the leader's brands different from its competitors. Customers can distinguish and reminiscence brands not only by any single sense, but they need more than one sense among five to differentiate. The practice of sensory branding projected to be one of the best activities to build brand image in marketing and to spread consciousness of the leader’s brands in consumers’ minds (Verma & Mishra, 2017). Dalle et al. (2015) emphasized the influences of scent and sight as predictors of purchase intention among some consumers; their findings indicated that both smell and sight are predictors of purchase intentions. A leader’s sensory branding or the five senses (smell, sound, sight, taste, or touch) create a one of a kind customer experience and, as a result, create a competitive advantage for leader’s brands. Two other theoretical frameworks on sensory branding are, namely, Schmitt’s experiential branding model and Hulten’s multisensory brand experience model (Dalle et al., 2015). Dalle et al. (2015) emphasized to retailers who seek to gain market share in the competitive environment by implementing innovative ways in a bid to influence customer buying behavior effectively. Leaders of retailers must use innovative methods, such as sensory branding, to change customer buying behavior. Leaders of retailers must focus on ensuring that there is a pleasing scent in coffee shops.

Rashid et al. (2015) identified two key findings that indicated attentiveness among respondents about brand identity. First, a distinctive concept, a leader’s brand, has identifiable processes that were needed to achieve a new and unique in shaping the brand identity to increase its relationship with customers. Some distinctive identifications included the owner’s vision, artistic elegance, business intelligence, and creativity. Second, having a fresh concept that would assist the process of a leader’s brand identity creation, coffee shop outlets should be as near as possible to *a comfortable home*. Aaker and Joachimsthaler's brand leadership model provided evidence of a leader’s brand identity in three stages from views of their customers, competitors, and their operation (Rashid et al., 2015. The three phases included (a) customer analysis stage, opinions on the customer needs containing to be remembered, value for money, the same quality of food every time, and to feel relaxed and comfortable; (b) competitor analysis stage, views included to be above the average standard when the sales slowdown and there are many competitors; (c) self-analysis stage included the sense of belonging to the brand, to stand out, creating a strong leader’s brand from internal sources and the importance of the name. Developing an appropriate leader’s brand identity through having a unique identification creation process, and introducing a fresh concept, are recommendations toward having a renewed idea for coffee shop leader’s brand identity.

Chitra, Manivel, and Arun (2016) emphasized focusing on the sales preferred by customers or favored by consumers by doing so the customer’s choices would allow leaders to gain insight on their opinion to help identify the need for preferring coffee. Also, the selection of foods that go along with it makes an impact on the desire of consumers. However, youngsters prefer a variety of foods regarding spending; they want excellent quality and taste. In essence, a leader knowing coffee preferred by customers marketing plays a significant role in sales and offers a variety of the leader’s branded coffee to customers and try to predict what extent the coffee has made an impact in the life of customers. Regarding marketing product, price, place, and promotion (4Ps), competition is crucial, and each has a leader’s technique of selling, buying, marketing, and promoting the business. Customers will come to analyze the market position of the coffee by coffee brewer's explicit knowledge about the type of coffee, the cost of coffee reduced, contamination avoided, the quality of coffee improved, and have a health impact (Chitra et al., 2016). Also, according to Chitra et al. (2016), the leaders' offers and promotions made available to customers.

Customers' preferences are different when they are shopping in a physical store compared to shopping online. Catering to consumers' online and in-store preferences can increase the effectiveness of traditional marketing tactics like direct marketing and enhanced customer service. Total retail sales for the third quarter of 2019 estimated $1,380.5 billion, an increase of 1.4% from the second quarter of 2019 (U.S. Census Bureau News, 2019). Because customers shop more using the Internet and cell phones, leaders of retailers must adjust their marketing strategies to reach these customers (Lund & Marinova, 2014). Many consumers, influenced by Internet marketers of products or brands, are persuaded to purchase particular brands or products. Survey results from Nuseir (2016) revealed that most of the consumers that purchased the online Internet marketer product did so because they liked that product, so they repurchased that product. Internet marketing helped leaders of businesses to retain their customers and increased brand loyalty. Internet marketing has facilitated leaders of companies and brands to increase their popularity, improve the customer retention ratio or, make loyal customers. Lund and Marinova (2014) emphasized that more and more research showed that leader's trying to take marketing strategies used in traditional, in-store retail environments and apply the same approach to new leader retail landscapes, such as websites, might not work. It is instinctive that efficiency and cost matter to customers online, and design and perceptions matter more to customers visiting stores. When the leaders of retailers cater to consumer preferences and invest in creating individual perceptions of the service environment, marketing efforts are more successful, and revenue increases (Lund & Marinova, 2014). If online customers already perceive a service as efficient and high quality, the leaders who are continuing to invest in direct marketing has beneficial effects for the company's revenue. In contrast, when online customers perceive a leader's service as inefficient but high quality, direct marketing investments are likely to have diminishing returns. Leaders' decision-making includes marketing investments based on customers' perceptions of the service and the service landscape.

According to Nagarajan et al. (2017), there are six keys to success in coffee shop management. The six keys include the following: (a) right from the coffee served to the cater and provide excellence; (b) the café staff introduces flavored brews differently with the best taste to make their customers try out new flavors each time they visit. The leader's unique blends of coffee and the cherished old-time ones are roasted; (c) each person who attends is valued in the café, and staff approaches every relationship with a respectful and caring nature; (d) use of eco-friendly and energy-efficient products and all products sold in the café are manufactured only by environmentally friendly companies. Also, a portion of the profits from sales donated to eco-friendly and social causes; (e) the environment is clean and bright with plenty of natural light and comfortable seating with an outdoor courtyard space which makes a big attraction during seasons; (f) the café provides free Wi-Fi access to their customers. The six keys to success allow the opportunity to other leaders of coffee shops in the management of their business who hope to increase market share.

In summary, According to Verma and Mishra (2017), a brand image built by spreading cognizance of sensory branding affects consumer purchase behavior. Dalle et al. (2015) emphasized the influences of scent and sight as predictors of purchase intention among some consumers; findings indicated that both smell and sight are predictors of purchase intentions. Two other theoretical frameworks on sensory branding are, namely, Schmitt’s experiential branding model and Hulten’s multisensory brand experience model (Dalle et al., 2015). Rashid et al. (2015) emphasized two key findings that indicated attentiveness among respondents about brand identity. First, a distinctive concept and second, coffee shop outlets should be as near as possible to a comfortable home. Also, Aaker and Joachimsthaler's brand leadership model provided evidence of a leader’s brand identity in three stages from views of their customers, competitors, and their operation (Rashid et al., 2015). Chitra et al. (2016) emphasized focusing on the sales preferred by customers or favored by customers by doing so the customer’s choices would allow leaders to gain insight on their opinion to help identify the need for preferring coffee. Customers will come to analyze the market position of the coffee by coffee brewer’s explicit knowledge about the type of coffee, the cost of coffee reduced, contamination avoided, the quality of coffee improved, and have a health impact (Chitra et al., 2016). Also, according to Chitra et al. (2016), the leaders’ offers and promotions made available to customers.

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Diversification and customer experience. The modern portfolio theory is an investment hypothesis that investors can use to build a portfolio to maximize their expected return based on a given level of risk (Salma & Hussain, 2018). The agency theory used to understand the relationships between agents and principals. The agent represented the principal in a particular business transaction and expected to serve the best interests of the principal without regard for self-interest (Salma & Hussain, 2018). In other words, the agency theory suggested to the leaders of business diversification activities to engage to minimize risk. Managerial ownership, director ownership, size, and growth, debt ratio, and, the substantial risk are strongly related to a leader's corporate diversification and firm performance across south Asian countries (Salma & Hussain, 2018). Also, according to Salma and Hussain (2018), a leader’s diversification is positioned as a strategy to reduce a company’s business risk and to enhance the company’s value.

The customer experience impacts various café atmosphere factors on the intentions of a customer’s revisit. Because the foodservice industry is highly competitive due to the increasing number of new entrants offering food products and services at a discount, to distinguish differentiation, the leaders of retailers should give particular importance to the environment. Researchers of past studies discovered that the leader’s store environment stimulates emotions that boost customer revisits by putting together different kinds or sorts of environmental stimuli that create an attractive atmosphere that would draw in customers (AbuThahir & Krishnapillai, 2018). AbuThahir and Krishnapillai (2018) identified from a study of customers, five factors that would impact the leader’s atmosphere of cafes such as lighting, music, decoration, cleanliness, and layouts were significantly influencing customers' intention to revisit. Of the five factors, the light considered to have the most significant effect, and the music was the least.

The course in large international firms is to have a strong leadership brand and serve customers in a better and different way. For example, one of the world’s largest coffee chains advertises that they strive to bring their customers outstanding experiences (Vanharanta et al., 2015). Customer satisfaction is no longer weighted essential but has substituted with the customer experience, along with products or services, which leader’s influences on a customers’ final decision making (Vanharanta et al., 2015). The customer experience can be affected by such things as a smile from a service employee, background music in a service setting, or the offering, which must be on a sound footing.

In summary, a leader's diversification and customer experience strategy have an impact on businesses. First, diversification discussed; the modern portfolio theory is an investment hypothesis that investors can use to build a portfolio to maximize their expected return based on a given level of risk (Salma & Hussain, 2018). Also, according to Salma and Hussain (2018), diversification is positioned as a leader's strategy to reduce a company's business risk and to enhance the company's value.

Second, the customer experience impacts various café atmosphere factors on the intentions of a customer's revisit. Because the foodservice industry is highly competitive due to the increasing number of new entrants offering food products and services at a discount, to distinguish differentiation, the leaders of retailers should give particular importance to the environment. Researchers of past studies discovered that store environment stimulates emotions that boost customer revisits by putting together different kinds or sorts of environmental stimuli that create an attractive atmosphere that would draw in customers (AbuThahir & Krishnapillai, 2018).

The course in large international firms is to have a strong brand and serve customers in a better and different way. Customer satisfaction is no longer weighted essential but has substituted with the customer experience, along with products or services, which leader's influences on a customers' final decision making (Vanharanta et al., 2015). The customer experience can be affected by such things as a smile from a service employee, background music in a service setting, or the offering, which must be on a sound footing.

Sustainability or green marketing strategy. Green marketing is one of the crucial and present-day methodologies, which is helping to strengthen the connections between leaders of SMBs, leaders of environmental agencies, and the community. Leaders of SMBs are socially responsible for how sustainability relates to the environment. Leaders of SMBs are accountable for doing business that contributes to the development of environmental, social, and economic benefits for all stakeholders. The consensus among consumers is that customers would appreciate products that are presumed to be environmentally safe; this would affect how consumers make their purchase. Consumers want to stay healthy and protect the environment. The main stakeholders include the environment, the leaders of SMBs, the community, the customers, and employees. Green marketing is a strategic tool for leaders of SMBs. A business leader who wants to outwit competitors is applying various green strategies to maximize profit and meet customer demand (Noo-urai & Jaroenwisan, 2016). According to Daniel (2019), when assessing the role of green marketing, leaders of SMBs need to consider the influences of the marketing mix, sustainability, and how they impact on SMBs.

Applying green marketing the right way would increase business performances and benefit all stakeholders. Leaders of businesses identify green marketing by changing how to package a product. Green marketing entails much more than how to wrap a product. The right way means to expand green marketing throughout the entire production, to how the product is perceived, and finally, to the effects it has on the environment. Various leaders of SMBs have different ways they strategize for their product to hit the market to get valuable returns (Daniel, 2019; Liargovas et al., 2017; Noo-urai & Jaroenwisan, 2016). Manufacturers consider how substantial consumers are about green marketing is for the leader of SMB revenue, by improving on green marketing as perceived, and the possibility of suffering from financial loss if consumers judged the leader of an SMB to be inadequately compliant with sustainability. Manufacturer decision-makers must choose among the strategies that are the best fitting to the leaders of SMBs objectives.

According to Daniel (2019), leaders of SMBs focus needs are (a) *product*, developed by leaders of SMBs are ecological products that do not contaminate the environment, instead, make the environment safer; (b) *price*, the pricing for the goods may be a bit higher than most products presumed to be environmentally safe, but consumers might pay because what they stand to gain is far more reaching than going for cheaper and more harmful products; (c) *place,* how the leader of an SMB does distribution logistics. Marketing agricultural products and seasonal products are more beneficial than importing these products; and (d) *promotion*, paid advertising, public relations, direct marketing, and on-site promotions and sales promotions are various ways a leader of an SMB can promote products and services to target markets. Leaders using the media is a powerful tool any organization can use to position its products in the minds of its customers and foster development. Surveys have shown that leaders of SMBs that make and enhance their existing products with the idea of their environmental safety are in better condition than those who have little or no regard for their environment (Daniel, 2019). Leaders who protect the employees, customers, and the environment portray ease of access venturing into new markets, overall competitive advantage over other SMBs, and, most importantly, their profit sustainability (Daniel, 2019).

The idea of sustainability has turned into a priority in the business sector, and this kind of entrepreneurship helps to create more sustainable societies. Sustainability is an expectation of a generation to manage the resource base, such as the average quality of life that we experience can potentially be shared by all future generations (Liargovas et al., 2017). The role of leaders in protecting the environment is highly publicized. The literature is rich in environmental protection; however, the part of leaders of SMBs is still minimally advertised as well as the focus given to large enterprises. In contrast, approximately 60-70% of total contamination comes from the activities of SMBs (Liargovas et al., 2017). Green marketing contains all strategies and techniques for leaders of businesses to improve the environmental performance of products, which is significant in all stages of production. Liargovas et al. (2017) examined the way leaders of SMBs adapt their financial and operational planning to develop green marketing entrepreneurship. They tested two different practices which may be followed by leaders of businesses: policies and strategies that lead enterprises to energy upgrades and policies and procedures relating to environmental protection. First, policies and strategies that lead enterprises to energy upgrades, through this process, products or systems are produced, giving priority to energy and new raw materials saving, replace input components, reducing harmful outputs, and carrying out the recycling, by making outputs to inputs. Second, policies and strategies relating to environmental protection, the more governments focus on systems and ecological safety, public health, and sustainability, the better it is for SMBs that choose to harness the potentials green marketing possesses. According to Bragg, Eby, Arshonsky, Bragg, and Ogedegbe (2017), researchers' studies showed food companies online promotions use a variety of marketing techniques to promote mostly energy-dense, nutrient-poor products. Economic globalization has enabled food and beverage marketers to introduce a range of reasonably priced, resonant cultural products and market them to responsive audiences. Marketers are in control of the influence their products have on the population they target. Bragg et al. (2017) findings of food companies' online promotions using marketing techniques can guide the development of policies to address the growth of fast food and beverage marketing in developing and emerging markets in lower-middle-income countries and upper-middle-income countries. Policymakers could consider prohibiting the use of specific marketing techniques in their countries or advocate for the promotion and sale of healthier food and beverage producers.

In summary, green marketing is a strategic business plan of action or policy that refers to the process of selling products or services that are presumed to be environmentally safe (Daniel, 2019). Leaders of SMBs are socially responsible for how sustainability relates to the environment. Leaders of SMBs are accountable for doing business that contributes to the development of environmental, social, and economic benefits for all stakeholders. Leaders of SMBs use various strategy mix. The decision-makers choose among the strategies that are suitable to the leaders of SMBs objectives.

Regarding marketing the 4Ps, competition is crucial, and each leader has a technique of selling, buying, marketing, and promoting the business. The role of leaders in protecting the environment is highly publicized. The literature is rich in environmental protection; however, the part of leaders of SMBs is still minimally advertised as well as the focus given to large enterprises. In contrast, approximately 60-70% of total contamination comes from the activities of SMBs (Liargovas et al., 2017). Green marketing contains all strategies and techniques for leaders of businesses to improve the environmental performance of products, which is significant in all stages of production.

Funding Sources

Leaders of SMBs are essential for both developed and developing economies. However, they face many sustained funding constraints. In several national and regional surveys across the globe, leaders of SMBs consistently rank access to funds as the number one constraint to the growth of their companies (Esho & Verhoef, 2018). According to Esho and Verhoef (2018), both existing research and empirical evidence have established that leaders of SMBs lack access to adequate finance to fund their operations and growth. The widespread phenomenon referred to as the *funding gap*. The definition of a funding gap is the difference between the amount of funds companies require for operations and growth and the sum of funds that they receive (Esho & Verhoef, 2018).

Extant research on the funding gap leads to two perspectives. The first viewpoint attributes the cause of financial constraints primarily to supply-side factors. The main reason for this perspective is that information is either difficult to see through or hard to understand from the leaders of SMBs agreement finance institutions' supply of funding. Even when funds are available, the same factors are bound to increase transaction costs making it too expensive and consequently unprofitable for leaders of SMBs to access. The second viewpoint is on demand-side factors that attribute leaders of SMBs preferences and knowledge gaps on viable sources of finance as primary factors that accounted for inadequate funding. However, According to Zabri et al. (2017), reviews of previous literature indicated that managerial characteristics were proven to have a significant influence on and relationship with the financing practices of leaders for SMBs. Five manager's features include gender, age, education, experience, and ownership used in determining those factors influencing manager's financing preferences for different sources of financing such as internal equity, financing, debt financing, external equity financing available to leaders of SMBs.

More, existing research showed that the sources of finance available to leaders of SMBs are almost the same as those available to large firms. The challenge for leaders of SMBs is that they face more constraints in accessing them than large firms. Sources for finance for leaders of SMBs may either be formal or informal, internal or external, equity or debt, short-term or long-term, venture capital, bank finance, trade credit, factoring, leasing, technology-enabled sources, informal sources, and business angel finance **(**Esho & Verhoef, 2018). Sources of funding, such as bank finance, venture capital, factoring, leasing, and trade credit, are more traditionally used than others, such as crowd-funding and other technology-enabled peer-to-peer funding platforms. Leaders of SMBs also get funding from retained earnings, and government and regional institutions in the form of grants, loan guarantees, and subsidies. For a few SMBs quoted on stock exchanges, equity capital from the public can be a significant source of finance for growth.

In summary, leaders of SMBs are essential for both developed and developing economies. However, they face many sustained funding constraints. In several national and regional surveys across the globe, leaders of SMBs consistently rank access to funds as the number one constraint to the growth of their companies **(**Esho & Verhoef, 2018). According to Esho and Verhoef (2018), both existing research and empirical evidence have established that leaders of SMBs lack access to adequate finance to fund their operations and growth. The widespread phenomenon referred to as the *funding gap*.

Topics in relation to the conceptual model

This literature review included topics that contribute to understanding the study's research question: What funding sources and marketing strategies can leaders of nonprofit SMBs use to sustain their business more than 5 years? I presented sustainable conceptual business models to help leaders of SMBs position appropriate business strategy to achieve long-term success. The theoretical frameworks explored was through a review of course readings and pertinent authors' research studies that were relevant to the research problem under investigation. Greiner, Jablonski and Jablonski's, and Mella and Pellicelli's sustainable growth models can strengthen this study. By connecting existing knowledge can help leaders of SMBs identify which phase(s) issues that can guide towards improved performance in the way of how the leaders create, deliver, and captures value. The selection of Greiner, Jablonski and Jablonski's, and Mella and Pellicelli's conceptual growth models were chosen on its potential for facilitating an understanding of my research findings. The business growth models reflect various researchers' facts, information, and skills acquired through experience or education, and practical knowledge of the subject. The researchers' business growth models represented refer to VBM, which can be helpful in change management when examining problems in business. The main conceptual growth models discussed were GGM (Waterhouse, 2017), Jablonski and Jablonski's (2016) growth model, and Mella and Pellicelli's (2015) growth, model. The conceptual framework demonstrated an understanding of concepts that are relevant to the topic of this research paper and related to the broader areas of knowledge considered. Other main issues explored in this literature review included marketing strategies, customer relationship management, social media marketing, branding strategy, catering to the needs of in-store and online customers, diversification, customer experience, sustainability or green marketing strategy, and funding sources. The conceptual framework and other leading topics consisted of concepts, and together with their definitions and reference to scholarly literature, are used to support this study.

Transition

I provided the information in Section 1 to bring attention to the high percentage of leaders of SMBs who fail to sustain their businesses long-term, which lessens the potential for contribution to job creation, economic growth, and poverty reduction. Chief amongst the challenges of leaders of SMBs are access to finance, along with using an effective marketing strategy. There is a need to investigate and explore to identify what funding sources and marketing strategies can leaders of nonprofit SMBs use to sustain their businesses more than 5 years. In Section 2, I describe the project as an endeavor to answer the research question by providing a guide to the research process such as participants, research method, research design, population and sampling, ethical research, data collection instruments, data technique, and data analysis. In Section 3, I provide a full version or account of the research question addressed, such as presentation of findings, application to professional practice, implications for social change, recommendations for action, suggestions for further research, and conclusion.

Section 2: The Project

Leaders of SMBs are at the heart of national and local economic growth. However, leaders of SMBs are facing obstacles to staying in business for the long term. Innovating and seizing opportunities, leaders drive federal and regional economic change and competitiveness (Al-Awlaqi, Aamer, & Habtoor, 2018). I explored how leaders of SMBs develop funding sources and marketing strategies to maintain their businesses more than 5 years. The information I provided in Section 1 expanded the need to investigate and explore to identify what funding sources and marketing strategies leaders of nonprofit SMBs can use to maintain their businesses more than 5 years. In Section 2, I present and explain how, in developing the project’s process, I included contemplative and rational thinking linked with evidence for the phenomenon under study.

Purpose Statement

The purpose of this qualitative single-case study was to explore how leaders of SMBs have developed funding sources and marketing strategies to sustain their businesses more than 5 years. The target population for this study consisted of three leaders from a nonprofit SMB organization located in the mid-Atlantic region of the United States. Implications for positive social change as a result of this study include the potential identification of funding sources and marketing strategies to help SMB leaders sustain their businesses more than 5 years, thereby creating and maintaining jobs in local communities. By opening local jobs, leaders of SMBs can provide employment opportunities to people in local communities to increase incomes and improve quality of life. Leaders of profitable SMBs can also offer tax revenues to local communities for supporting services such as police, schools, and infrastructure.

Role of the Researcher

My role as a qualitative researcher allowed me to collect, analyze, and interpret data and report findings to increase understanding of the phenomenon under study. In qualitative research, the researcher endeavors to gain an in-depth knowledge of an event through a variety of collected data sources using words or codes for analysis (Yin, 2018). According to McGrath, Palmgren, and Liljedahl (2018), interviews provide an opportunity to explore, in an in-depth manner, matters that are unique to the experiences of the interviewees, allowing insight into how different phenomena of interest are experienced and comprehended. According to Kabir (2016), case studies will enable a researcher to investigate a topic in more detail than might be possible if a researcher were trying to deal with a large number of research participants. I was the primary data collection instrument, and I conducted semistructured interviews with participants for this qualitative single-case study; this allowed me to investigate the research topic in detail. The focus of the in-depth semistructured interviews anchored the purpose of the study and research question. According to Castillo-Montoya (2016), an interview protocol refers to a set of questions to facilitate and guide a researcher’s semistructured open-ended interviews. Before the discussions, I created an interview protocol to help me prepare and to determine the most critical information I needed to obtain. During the interviews, I asked open-ended interview questions to gain insight and knowledge into the problem statement, which encouraged the participants to speak their own words. I collected data on different perspectives to gain a fundamental understanding of funding sources and marketing strategies to sustain SMB nonprofit businesses.

The primary goal of collecting data was to provide a quality study based on moral uprightness and the laws of ethical research. I was responsible for exercising moral principles and demonstrating ethical research protocols. The Belmont report is a statement of fundamental ethical principles and guidelines meant to assist in resolving ethical problems that can surround research with humans. The Belmont report upholds respect for persons, beneficence, and justice (U.S Department of Health and Human Services, 2018). In this study, I adhered to the three basic ethical principles from the Belmont report: (a) respect for persons, i.e., the requirement to acknowledge autonomy and the obligation to protect those with diminished autonomy (U.S. Department of Human and Health Services, 2018); (b) beneficence, i.e., do not harm and maximize possible benefits and minimize potential harms; (c) justice, which relates to five accepted formulations of just ways to distribute burdens and benefits to each person an equal share, according to individual need, according to individual effort, according to societal contribution, and according to merit (U.S. Department of Human and Health Services, 2018).

During this study, I was responsible for avoiding favoritism and bias. The quality of the research depends on the integrity and objectivity of the researcher, which means acting openly, being truthful and promoting accuracy, and avoiding deception, dishonesty, misrepresentation (e.g., data and findings), partiality, reckless commitments or disingenuous promises (Saunders, Lewis, & Thornhill, 2015). I mitigated and managed the use of a personal lens during the data collection process by remaining conscious of assumptions, preconceptions, cultural, and other biases that might have prevented me from exploring issues that would enrich the research. Credibility, dependability, transferability, and confirmability are used to judge the quality of qualitative case studies. Credibility refers to trustworthiness or proof of the results of multiple sources used in the research study when cross checked and judged believable (Saunders et al., 2015). To avoid assumptions, preconceptions, cultural, and other biases, or to ensure the quality of this study during the data collection process, I had participants review the results through member checking. Dependability is the evaluation of the stability of the integrated quality of data collection and analysis (Saunders et al., 2015). I ensured dependability by verifying the data collected with other data sources. Transferability is the potential generalizability of the research findings. Because I have provided a full description of the components of research, a reader could determine whether the study can apply to another setting of interest. Confirmability (authenticity criteria) refers to the degree to which the results could be confirmed or supported by other findings (Saunders et al., 2015). To enhance confirmability, I documented the procedures for checking and rechecking the data throughout the study. The engagements among the people involved in the study, the conceptual framework, and the scholarly literature used to support this study have brought about the outcome of the research and the construction of knowledge.

Participants

The Baldrige Excellence Framework is a basis for the Walden DBA consulting capstone program. Students are consultants to client organizations. The criteria for performance excellence are a set of questions about seven critical aspects of managing and performing as an organization: (a) leadership; (b) strategy; (c) customers; (d) measurement, analysis, and knowledge management; (e) workforce; (f) operations; and (g) results. Researchers use these criteria to work together as a unique, integrated performance management framework. Leaders of the organization participating in answering the questions helps the researcher align resources; identify strengths and opportunities for improvement; improve communication, productivity, and effectiveness; and achieve strategic goals. As a result, the researcher can deliver value to the leaders of an organization and stakeholders, which contributes to organizational sustainability; the researcher improves the organization's overall effectiveness and capability, and the leaders of the organization develop and learn.

The participants must meet the eligibility requirement within the scope of the population (Walden University, 2019). A participant is a person from whom case study data are collected, usually through interviews; one or more participants may later be asked to review the draft case study report (Yin, 2018). The participants in this study included three leaders of a nonprofit SMB organization located in the mid-Atlantic region of the United States with the knowledge that would align with the research question and focus of my study. The participants I chose for data collection aligned with the overarching research question: What funding sources and marketing strategies can leaders of nonprofit SMBs use to sustain their businesses more than 5 years? I gathered primary case study data from participants through semistructured interviews and review of documents for the study sample.

I had no previous relationship with the client organization or study participants. Before scheduling interviews with the participants, access to the leaders of the organization or participants to collect data was leveraged by the DBA Consulting Capstone Program by way of a research agreement that required a legal signatory (Appendix B). The research agreement included information about the subjects' rights, the purpose of the study, the procedures to be undertaken, and the potential risks and benefits of participation. The signed research agreement from the DBA Consulting Capstone Program and the client organization allowed the establishment of a working relationship with the participants so they would participate meaningfully to enable the collection of data.

According to Castillo-Montoya (2016), it is crucial to ensure that the interview questions align with the research question. This alignment can increase the utility of interview questions in the research process (confirming their purpose) while ensuring their necessity for the study (eliminating unnecessary ones). The research question is something a researcher answers by conducting a study. Once I decided on the research question, I designed interview questions to explore qualitative data. In this study, I developed the interview questions based on the research question; thus, the interview questions aligned with the central research question. I asked the interview questions of participants to gain understanding, and the research question represented what I sought to understand. According to

Castillo-Montoya (2016) and McGrath et al. (2018), relevant practices include scheduling interviews in advance, building rapport with participants, making participants feel comfortable during interviews, and using an interview protocol for qualitative interviews. I drafted a summary of the study and sent it to the participants before their meetings to prepare them for the interview, to clarify what they could expect. According to Yin (2018), using open-ended questions enables open discussion with participants rather than a straightforward question-and-answer format. Conducting an active workplace investigation meant finding out valuable information that would help determine what happened and how to proceed. I reviewed the literature on how to develop useful interview questions. I worked with the DBA Consulting Capstone Program on approval of the design on the instrument questions to obtain qualitative data.

During the interviews, I gathered information from client leaders involved in the phenomenon under study. I asked participants to state their answers in their own words. I opened the conversation with a few easy questions to make the participant comfortable and familiarized the leader with the topic of the interview. An interview protocol is an instrument of inquiry that allows asking questions for a conversation about the phenomenon under study and also used as a means to probe the participant on initial interview questions. According to Drabble, Trocki, Salcedo, Walker, and Korcha (2016), the researchers of a small but growing body of literature has documented the potential of in-depth telephone interviews as a viable option for qualitative research. I interviewed three leaders from the client organization. First, I sent the interview questions to participants via email for a reply to the interview via a Zoom meeting, using the telephone was optional. Set a convenient day and time with the participants for the interview. During the interviews, I used an interview protocol to ask questions to gain further understanding of the phenomenon under study.

Research Method and Design

Research Method

Three research methods include qualitative, quantitative, or mixed. Researchers can use the qualitative method to study a program, activity, or process in-depth, permitting description of operations or groups' responses to interventions in real-life contexts (Grant, Wolf, & Nebeker, 2018). Quantitative researchers use research methods that generate quantitative data such as data sets, laboratory-based methods, questionnaires, surveys, structured interviews, and formal observation (Boeren, 2017). Quantitative researchers use statistical analysis techniques to examine the data collected, whether descriptive or inferential, in context. I decided on a qualitative method to build a meaningful descriptive portrayal of the phenomenon under study. Qualitative methods are exploratory; researchers use the qualitative method to seek the opinions and thoughts of participants. The intent of this study was not to examine quantitative data; therefore, a quantitative methodology was not appropriate. Researchers use a mixed-method, both qualitative and quantitative data to address the research (Walker & Baxter, 2019). The quantitative approach was not needed to address the intent of the study; therefore, a mixed methodology was not appropriate.

Research Design

A researcher's case study design can be either single or multiple for different reasons (Yin, 2018). An investigator's single-case design refers to one single-case to develop an understanding of the phenomenon. In contrast, an investigator’s multiple-case design refers to the inclusion of multiple cases to build an in-depth understanding of the phenomena. I chose a single-case design for this qualitative case study because the focus consists of one case that will be relevant to some SMBs. The focus of this study does not involve multiple cases; therefore, a multiple-case design was not appropriate. Various other types of qualitative case study designs can be used for preparing, planning, and conducting research. Each design varies in definition, application, validity, and purposefulness (Harrison, Birks, Franklin, & Mills, 2017). Three other types of qualitative case study designs were considered: phenomenological, ethnographic, and narrative perspectives. All three approaches have in common the general process of research that begins with a problem statement and moves forward to the questions, the data, the data analysis, and interpretations and the research report. According to Crawford (2016), the phenomenological approach, united with the case study method, allows the researcher to come to understand or make sense of intricate human experiences and the essence and the underlying structure of a phenomenon. The focus of this study was not to understand or make sense of how people perceive their experiences;

therefore, a phenomenology design was not appropriate. Case study and ethnography are two of the most popular qualitative research approaches. According to Trimmer and Wood (2016), an ethnography approach is characterized by social and behavioral phenomena in naturalistic settings through participant observations, where the researcher embedded in a social world observes behaviors as they occur on site. The focus of this study was not to collect and analyze data on the way of life from a single social group or society; therefore, an ethnography design was not appropriate. According to George and Selimos (2018), a narrative approach analyzes the content of stories, how stories told, and the way people narrate their experiences that comprise public and cultural domains to explore shared cultural meanings, norms, and collective practices. The focus of the study was not to analyze the content of stories, how stories told, and the way people narrate their experiences; therefore, the narrative design was not appropriate.

Data saturation in qualitative research is used to refer to a criterion during the analysis of information if the same themes are recurring, and no new insights are provided as additional sources of data to discontinue data collection or analysis (Saunders et al., 2018). Data saturation verification occurs at the point of the repetition of information among participants and no new information provided. I reached data saturation after I collected and could not find any further information on the phenomenon under study and analyzed enough data to answer the research question.

Population and Sampling

A research population defined as individuals having one or more characteristics of interest or the complete collection (sample) to be studied (Asiamah, Mensah, & Oteng-Abayie, 2017). According to Etikan, Musa, and Alkassim (2016), researchers of qualitative studies focus on relatively few participants who can describe their experiences or knowledge concerning the research question or phenomenon. I used the purposive sampling technique to choose the research population. The purposive sampling technique, also known as judgment (selective or subjective sampling), is a sampling technique in which the researcher relies on his or her discretion when choosing members of a population to participate in the study (Etikan et al., 2016). Purposive sampling is a nonrandom technique used by a researcher that does not need underlying theories or a set number of participants. I used the purposive sampling technique, which is an appropriate method with a limited number of primary data sources who contributed to the research.

I chose three leaders of a nonprofit SMB selected for a gathering of data from in-depth semistructured interviews. The participants chosen were proficient and well informed about the phenomenon of interest. The participants were knowledgeable, experienced, available, willing to participate, and the ability to communicate experiences and opinions in an articulate, expressive, and reflective manner. According to Etikan et al. (2016), unlike random studies, purposive sampling is a nonrandom technique that does not need to include the participants’ backgrounds, cultures, and ages. The idea behind using purposive sampling was to concentrate on individuals who were able to assist by providing data and information relevant to the research question.

There are various purposive sampling methods such as maximum variation sampling, homogeneous sampling, typical case sampling, extreme/deviant case sampling, critical case sampling, total population sampling, and expert sample (Palinkas et al., 2015). For this study, I chose a qualitative typical case sampling method as a type of purposive sampling to select qualified participants to describe and illustrate the relevance of the phenomenon under investigation to the leaders of SMBs. Using a qualitative typical case sampling method allowed me to achieve a depth of understanding with an emphasis on saturation or obtaining a comprehensive agreement by continuing to sample until no new substantive information was acquired. In this study, the three participants included provided rich data, and varied experiences with strategies used to increase income.

Ethical Research

The consideration of ethical issues is crucial throughout all stages of a qualitative study to keep the balance between the potential risks of research and the possible benefits of the research (Mohd Arifin, 2018). According to Wallace and Sheldon (2015), findings indicated that personal relationships with participants (the principle of research merit and integrity) of the contextual dimensions and risk of confidentiality might be of concern in research proposals. The ethical duty of confidentially refers to the obligation of an individual or organization to safeguard entrusted information. According to Ngozwana

(2018), privacy arises at all stages of the research life cycle, including the first collection of information, the use of analysis to address research questions, dimensions of findings, storage and retention of information, disclosure of personal data and disposal of documents.

I ensured no disclosure of proprietary sensitive or confidential information in the doctoral study. I received approval from Walden's Institutional Review Board (IRB) before the collection of any data, such as participants and archival data. Per IRB requirements, the consent form referred to study descriptions and participants' rights, and the service order (Appendix C) related to a written representation of the project's work requirement, which defined the project-specific activities, deliverables, and timelines for services to the client organization. The primary purpose of the IRB is to protect the rights and welfare of participants involved in research activities conducted under its authority. The data will be kept confidential for the length of time of the study. On completion of the study, I will retain the data for 5 years in a secure environment as stipulated in the consent form. My IRB approval number for this study is 02-14-19-0972024. In this qualitative case study, the focus of ethics was to avoid moral ambiguity, unexpected stakeholder reactions, shifting of ethical standards, and violations of the law. A researcher who avoids incorrect reporting and inappropriate use of information allows the reader to determine the validity of the events and interpretations in the case. An investigator's well-designed study makes contributions to the body of knowledge. Conversely, a poorly conducted review violates the principle of justice, such as time and resources wasted for research sponsors, researchers, and participants, and undermines the societal trust in conceptual inquiry (Yip, Han, & Sng, 2016).

The IRB required an informed consent document to be signed by the participating organization to ensure ethical research. The agreement of the IRB's informed consent allows permission granted in the knowledge of possible consequences that pertain to the study with a full understanding of the potential risks and benefits. Each participant in the study gave written permission to take part in the data collection phase of the work. The participants informed of the right to refuse to participate or withdraw consent at any time without penalty, retaliation, or affecting Walden University and the client organization relationship. No potential participant risks were associated with this study; the benefits included education to the broader community; no additional incentives offered.

Data Collection Instruments

Data collection instruments refer to the device used to collect data and the methods used to identify information sources and gather information during an evaluation (Saunders et al., 2015). A researcher's data collection allows the opportunity to reproduce real-life communication. In this study, the respondents made oral or written contributions that were useful for this study's research purpose and, at the same time, beneficial for their learning process. I was the primary data collection instrument, who conducted in-depth semistructured interviews. Secondary sources included documents pertaining to performance outcome data, information provided by the client leader, and the organization's website data and information related to finances, budget, and market share. The conversations I conducted were informal and included some planned questions (Appendix D). I had the flexibility to modify the wording and order of questions. Some strengths of the focused, in-depth semistructured interviews included participants' freedom to talk about something in detail and depth.

According to Castillo-Montoya (2016), a researcher's interview protocol is an instrument of inquiry that allows the asking of questions for specific information linked to the aims of a study, and a tool for a conversation about a topic. I used an interview protocol to guide the asking of questions associated with the purpose of the study, including probing questions during and after the review of the first interviews (Appendix E). I used the Baldrige Excellence Framework criteria set of questions about the seven critical aspects of managing and performing as an organization, which involved: (a) leadership; (b) strategy; (c) customers, (d) measurement, analysis, and knowledge management; (e) workforce; (f) operations; and (g) results. I asked questions from participants using Zoom meetings, telephone, and e-mail messages. For example, I asked leaders of the client organization about their experiences and expectations related to the phenomenon under study, the thoughts they had concerning program operations, processes, and outcomes. Also, what funding sources and marketing strategies that leaders of nonprofit SMBs could use to sustain operations now and in the future. The process for conducting in-depth semistructured interviews involved a plan or identification of stakeholders and the development of an instrument or interview protocol. Also, the collection of data involved setting up and conducting the interviews, transcribing, reviewing data, analyzing all interview data, and communicating the findings to interviewees or stakeholders. I used member checking to enhance the reliability and validity of the data collection instrument process, which involved the respondents' receiving my analysis of responses for validation. According to Birt, Scott, Cavers, Campbell, and Walter (2016), member checking is a technique for exploring the credibility of results. Data or results were returned to the participants to check for accuracy and resonance with their experience. I sent an analysis of the responses to each participant for a member-checking review of the responses they provided during the interview for validation and received back their approval.

Data Collection Technique

The appropriate choice of data collection technique helps to support a DBA doctoral research question. My study's research question was: What funding sources and marketing strategies can leaders of nonprofit SMBs use to sustain their businesses more than 5 years? The use of multiple methods to collect data is encouraged and found to be mutually informative in a case study research because, together, these multiple methods provide a more synergistic and comprehensive view of the issue under study (Harrison et al., 2017). The primary method I used to collect data included in-depth semistructured interviews using Zoom meetings. Zoom is a collaborative, cloud-based videoconferencing service offering features including online meetings, group messaging services, and secure recording of sessions (Zoom Video Communications Inc., 2016). I used Zoom because of several unique features. Some advantages included the ability to communicate in real-time with geographically dispersed individuals using the computer, which included face-to-face interviews (for example, the ability to respond to verbal and nonverbal cues), and the ability to record and store sessions securely. I set up Zoom meetings with three leaders of the organization on days and times that were convenient for them to partake in a session up to an hour and a half. In contrast, some disadvantages can include technical difficulties that result in poor video or audio quality. Poor sound quality can lead to poorly translated written texts. After I retrieved and reviewed the translated written texts in a word document, I used member checking to validate the accuracy of results. I received approvals of the responses that each leader provided. Secondary sources included documents pertaining to performance outcome data, information provided by the client leader, and the organization's website data and information related to finances, budget, and market share.

The management of the data collection technique involved being selective and specific in identifying the participants and the process explored. Semistructured in-depth interviews are preferred for qualitative data collection (Adhabi & Anozie, 2017). The reason I chose in-depth semistructured interviews for data collection technique was to encourage participants in the study to describe their experiences with funding sources and marketing strategies used to sustain their businesses more than 5 years. An advantage I had in conducting in-depth semistructured interviews was the opportunity to ask open-ended questions that allowed for a discussion to gather rich, thick data.

According to Yin (2018), a researcher's case study requires an inquiring mind during data collection, not just before and after the activity. I asked questions from all relevant sources to find answers to the research problem and evaluate the outcomes. During the interviews, I gathered data from the participants using an interview protocol about the Baldrige Excellence Framework criteria set of questions. Qualitative data collection technique includes analysis of texts and documents to learn about distributed or private knowledge (Hammarberg, Kirkman, & de Lacey, 2016). Using the study of texts and documents for techniques gave voice and meaning in the form of written (or graphic) materials that contained information relevant to the research topic.

Data Organization Techniques

A qualitative researcher must select the best system for keeping track of data and emerging understandings. Using appropriate strategies prevents duplicating the work while at the same time saves time to complete the task (Osborne, 2016). In this study, to identify the funding sources and marketing strategies for SMBs, research logs, reflective journals, and cataloging systems were useful to keep track of data and emerging understandings.

An investigator's researcher log is valuable for keeping track of the search history. The investigator's research log requires the researcher to write the research notes, which aids in saving time when writing the final paper (Osborne, 2016). The research log system can include features to improve reliability. A researcher can use the endnote feature, which is critical in allowing the importation of references from online databases. I built a reference list in a word document to compile the sources used. The research log system was essential because it enabled me to record how and where I acquired the source.

A reflective journal system allows a researcher to use reflection and evaluation skills to assess experiences in the overall research process (Ullman, 2019). Also, according to Ullman (2019), a reflective journal is critical in aiding the researcher to understand the process that he or she is undertaking. My thinking skills improved because using a reflective journal helped me to develop a deeper understanding of what the entire research entailed. The reflective journal was essential in tracking and reflecting on the funding sources and marketing strategies used by SMBs. Using a reflective journal on information collected assisted me in identifying leaders' plans. I used the reflective journal to record dates and descriptions of communication to the leaders of the organization. For example, I recorded the following: who I communicated with, communication objective, communication method (phone, Zoom conferencing, or email), a summary of the communication, follow up needed, and approximate length of the communication method used. The reflection of the ongoing discussions from the leaders helped me to align future actions for collaboration in obtaining information from the leaders on the funding sources and marketing strategies used by SMBs.

The cataloging system allows the organization of records obtained in research work in the form of a catalog. Catalog metadata is a system structured to follow an international standard by entering the title, description of the data, the authors, and affiliation (Stillerman, Fredian, Greenwald, & Manduchi, 2016). The catalog metadata system can be applicable in research by assisting in the storage of information on the phenomenon under study. I did not select the use of the catalog metadata. The approach of using catalog metadata looked promising at the start. For this study, I found the research logs and reflective journals sufficient for keeping track of data and emerging understandings. Using effective systems for keeping track of data and emerging knowledge assures a qualitative researcher of the best outcomes. The research logs, reflective journals, and cataloging systems are vital in the study by assisting in keeping track of the data used.

The primary purpose of the IRB is to protect the rights and welfare of participants involved in research activities conducted under its authority (Qiao, 2018). Depending on the source of the data, the data collection process safeguarded by oversight by a review process involving IRB. The data were kept confidential throughout the study. On completion of the study, I will retain the data for 5 years in a secure environment. Interactions with the specific human subjects in research come through direct contacts, such as in interviews and the use of archival records (Yin, 2018). Some examples of how to erase data include documents shredded and electronic voice and data files on a mobile device and personal computer permanently deleted. I will use a paper shredder to destroy written materials and notes. Using Windows OS, Eraser is a highly rated free tool for any computer using the Windows operating system. This tool works well to delete individual files and folders that contain sensitive or personal information that is no longer needed. Also, I will use a phone app from the home screen of my iPhone to delete leaders' phone records; and physically destroy the memory card and SIM card of the computer and mobile device.

Data Analysis

Triangulation refers to a validity procedure in which researchers search for convergence among multiple and different sources of information to form themes in a study (Yin, 2018). A researcher can use triangulation as a strategy for improving the validity and reliability of research findings (Kaman & Othman, 2016). According to Fusch, Fusch, and Ness (2018), one approach to enhance reaching data saturation is through the triangulation of multiple sources of data. Triangulation adds depth to a researcher’s data collection. There are various triangulation types: data, investigator, theory, and methodological. Data triangulation can include matters involving people; investigator triangulation uses several researchers in a study; theory triangulation encourages several theoretical schemes to enable interpretation of a phenomenon, and methodological triangulation promotes the use of several data collection methods (Noble & Heale, 2019). For this study, I used methodological triangulation. A researcher using methodological triangulation can confirm findings, more comprehensive data, increased validity, and provide an enhanced understanding of the phenomena under study (Harrison et al., 2017). I used multiple sources and collected data from participants to analyze and converge the findings. According to Yin (2018), by developing convergent evidence, methodological triangulation using data sources aids to strengthen the construct validity in the case study. The primary sources of data collected for my analysis included various participants’ viewpoints from in-depth semistructured interviews using telephone and Zoom meetings using an interview protocol. I used multiple sources of evidence that provided numerous views of the same phenomenon.

I used a manual database system for documents to help organize and store analyzed data collection. According to Yin (2018), the database format can allow the data to be perused and retrieved. A question-and-answer form, based on the questions that were part of the study protocol, served as one way of organizing the database. I used the data from the study protocol to gather data from participants' interviews and the DBA consulting capstone organization communication journal, which contained a log of notes. According to Saunders et al. (2015), Yin (2018), and Maher et al. (2018), the data gathered from participants' interviews, computer-assisted tools would aid with the coding and theme analysis of the discussions. I considered a manual review of the data to start, but to avoid manual errors and to ensure the reliability and validity of the data analysis, I used a software program to identify the number of codes and themes. By using the thematic approach, three themes became evident: community, job, and marketing.

I conducted an alignment of scholarly literature, conceptual framework, and the findings. I presented an overall review of the literature regarding the phenomenon under study. The conceptual frameworks presented were used as an analytical tool with several variations and contexts, which can be applied in different categories of work where an overall picture is needed. The conceptual frameworks helped me make conceptual distinctions and organize ideas. Understanding the similarities and differences between the literature review and conceptual frameworks helped in organizing, conceptualizing, and conducting the research. Analyzing the literature review and the conceptual frameworks, and using a software program for analyses of semistructured interviews from participants helped to analyze the findings. I used the themes obtained from a software program as concepts and constructs because the themes correlated with the literature and conceptual framework. In the summary of this study, I summarized the main findings, addressed new studies published since writing this proposal, and proposed steps for future research that builds on my research and study findings. The findings of this might help with the analysis of new studies published after this proposal.

Reliability and Validity

Reliability

Reliability and validity are central to judgments about the quality of research in the evaluation of data collection instruments for the study (Saunders et al., 2015). According to Mohajan (2017), qualitative study validity concerns how well the researcher’s instruments for data collection assess quality or value. Reliability involves the researcher’s faith in data obtained from using instruments or the degree to which the instruments control for random error. A researcher’s information used from two or more sources of evidence allows the reader to determine the reliability and validity of the events and interpretations in the case. I used data from multiple sources of evidence to ensure the reliability and validity of the findings.

Dependability is the evaluation of the stability of the integrated quality of data collection and analysis (Noble & Smith, 2015). As an approach to ensure dependability, the data collected were verified with other data sources. I used a variety of methods to collect data on each topic, such as semistructured interviews, documents pertaining to performance outcome data, information provided by the client leader, and the organization's website data and information related to finances, budget, and market share. It was crucial to confirm that the findings gathered from my data collection were consistent to make sure if other researchers reviewed the data, they would arrive at similar results, interpretations, and conclusions about the data. Also, to enhance the reliability and validity of my research study, the data provided from participants' interviews using Zoom meetings were transcribed in a word document by using an automated transcription software. I used an automated transcription service after completion of my conversations with participants to connect to the Zoom meetings to listen and type the audio and video files. Then, I had the participants review the written work for their validation (member checking). Member checking involved the respondents' review of my analysis of what they provided during the interview for validation.

According to Belotto (2018), the review of transcripts against coding and thematic development increases reliability. I transcribed the data collected from the interviewees into a word document. I reviewed the transcripts against coding and thematic development and verified by analyzing the data from the participants' in-depth semistructured interviews, which helped make transparent, consistent data. Primary sources of data collection included telephone and Zoom meeting interviews used with secondary sources of data collection.

Validity

Researchers use credibility, transferability, and confirmability to assess the study's reliability, validity, and accuracy. Credibility refers to trustworthiness or proof of the results of multiple sources used in the research study when cross-checked and judged believable (Saunders et al., 2015). Member checking is informant feedback or respondent validation and is a technique for exploring the credibility of results. Data or results are returned to participants to check for accuracy and resonance with their experiences (Birt et al., 2016). I used member checking to validate my interpretations of participants' experiences from in-depth semistructured interviews using an interview protocol (Appendix E).

According to Yin (2018), the triangulation technique used to check and establish validity in research studies by analyzing a research question from multiple viewpoints to arrive at consistency across the data sources. A researcher uses methodological triangulation of varying methods and perspectives to produce a comprehensive set of findings. A researcher using methodological triangulation can enrich research study because methodological triangulation offers a variety of datasets to explain different aspects of a phenomenon of interest. The use of triangulation assists a researcher to refute if one dataset invalidates a supposition generated by another (Noble & Heale, 2019).

I used methodological triangulation of data from multiple sources, such as various participants' viewpoints from in-depth semistructured Zoom meetings; also, secondary sources from documents and publicly available sources such as performance outcome data, information provided by the client leader, and the organization's website pertaining to finances, budget, and market share. I used data and information from documents and publicly available sources to enhance validity. I collected data or facts from primary and secondary sources and abstracted information. I organized and analyzed the data to make meaningful or useful information. I used the information to provide evidence to support conclusions. The data and information used to support the findings enhanced validity. Enhancing validity involved three stages: the raw data gathered, data organized from available reports drawn from multiple sources and merged into information, and evidence abstracted from the information through data analysis. Some interpretations were required between primary and secondary sources of information. The criteria used were validity, reliability, and accuracy. Triangulation was the strategy to test validity through the convergence of information from different sources.

Unlike quantitative studies, in which researchers can determine the transferability of the results, qualitative researchers do not generalize and do not state that the findings are transferable. However, by providing a full description of the components of research, the reader could judge whether the study can be used to another setting in which he or she finds of interest (Saunders et al., 2015). Regarding confirmability (authenticity criteria), this refers to the degree to which the results could be confirmed or supported by other findings. Using triangulation or more than one method to collect data on the same topic and using member checking to validate the data from respondents’ interviews, helped me ensure confirmability. By providing fact-finding support from using multiple sources of evidence in this study’s data collection process, the research provided supporting evidence for answering the research question.

Transition and Summary

I provided information in Section 2 about the description of the project that influenced the answer to the research question by providing a guide to the research process, which involved participants, research method, research design, population and sampling, ethical research, data collection instruments, data technique, and data analysis. In Section 3, the organizational profile includes a summary of key factors of strategic value to the company leaders. The organizational profile is a brief review of the decisive business influences on how the leaders' organization works and the crucial challenges faced (Baldrige Performance Excellence Program, 2017). The first part of Section 3 includes the company's description, the company's situation, leadership, strategy, and customers. Section 3 also includes a holistic evaluation of organizational leadership; strategy; customers; measurement, analysis, and knowledge management; workforce; operations; and operational results. The holistic evaluation concludes with a project summary, contributions, and recommendations for action and further research.

Section 3: Organizational Profile

The purpose of this qualitative single-case study was to explore how leaders of SMBs develop funding sources and marketing strategies to sustain their businesses more than 5 years. The organizational profile is a view of the company, the critical influences on how it operates, and the competitive environment (Baldrige Performance Excellence Program, 2017). This case study analysis required me to investigate the business problem, examine the alternative solutions, and propose practical solutions using supportive evidence. Background information on the specific topic is provided, as well as project summary and recommendations.

Key Factors Worksheet

Organizational Description

The organizational description refers to the organization's vital organizational characteristics (Baldrige Performance Excellence Program, 2017). The purpose of describing the client organization's key organizational features was to provide an understanding of the organization's environment, which includes product offerings, mission, vision, values, workforce profile, assets, and regulatory requirements. The client organization's relationships include organizational structure, customers, stakeholders, suppliers, and partners. The objective is to make clear the focus and importance of the organization's efforts.

The client organization is a nonprofit coffeehouse the leaders started with a passion for helping youths develop skills in the workplace. The leaders established the client organization in the mid-Atlantic region of the United States, where the cofounders were situated; the cofounders created the company to provide opportunities for youths to gain from job experience. The cofounders emphasized giving young people opportunities to learn from work experience because it helps prepare and develop general business awareness for future employment.

The leaders of the client organization work directly with the leaders of the project organization working to provide opportunities for disconnected youths who are at risk or not in education, employment, or training who live in the mid-Atlantic region of the United States. Young people can build skills and learn moral values such as teamwork and cooperation. Without opportunities for youth employment, there is the potential to have significant and severe social repercussions. Youth unemployment can lead to a lack of work skills, debt, or severe financial hardship, poverty, lack of self-esteem, increased social isolation, homelessness, and crime. Job opportunities must be available to youths who are at risk and want to create a better life for themselves and to break cycles of generational poverty. The cofounders and partners of the client organization focus on hands-on training and developing practical job and life skills that youths can use for future employment or expertise to manage to keep going in difficult circumstances.

Organizational environment. The influences between the organization and its environment are reciprocal. The organization influences the environment through product and the environment control acting within its organization (Blaga & Balcescu, 2016). The environment consists of external forces that influence the progression or sustainability of the company; therefore, the setting directly affects the organization's strategic plans. The organization's strategic plans include its product offerings, mission, vision, values, workforce profile, assets, and regulatory requirements in addition to organizational relationships, which include organizational structure, customers, stakeholders, suppliers, and partners.

Product offerings. The client organization is a place where people go to eat, to socialize, and to buy a unique and valuable experience. Innovations serve to help survive on the market, to improve processes and products, and to upgrade business concepts. Despite the uncertainty of the return on investments, severe competition leaves no choice but to innovate (Ivkov et al., 2016). Organization leaders must promote creativity and innovative ideas among leaders of the organization. The client organization's personnel offer products such as coffee, lattes, a variety of other beverages, and food sales such as wraps, sandwiches, muffins, fruit bowls, chips, soups, pastries, and salads including catering. The leaders of the client organization offer a working lunch program with free delivery. With a *working lunch*, the client organization's personnel deliver beverages and foods to a company during lunch hour. Individual orders are placed online by 3:00 p.m. the day before and delivered the next day between 11:00 a.m. to 1:00 p.m. with no delivery charge. Also, the leaders of the company offer venue rentals that provide space at the coffeehouse to host events such as bridal showers, and provide food and beverages for the occasion. Through food and beverage sales, the client organization provides opportunities for local youths to help develop the community.

Mission, vision, and values. A vision statement describes long-term organizational goals. A mission statement serves as a setting for the organization's purpose and strategy. The mission statement influences the critical priorities of the organization's core values and beliefs (Rachna, Osama, Robert, & Dean, 2016). The leaders of the client organization work together with others to uphold their values by striving to fulfill their vision and mission statements. Nonprofit organizations are public benefit businesses that receive their revenue from a combination of donations, grants, donated facilities and equipment, and low paid or volunteer staff.

The leaders of the client organization and the project organization collaborate on the program; their mission is to change the lives of disconnected youths in their community by breaking down employment and education barriers. The interns gain the knowledge, experience, and technical and social skills required in the restaurant and hospitality industry. Hands-on training and mentoring include real-world work experience, enrichment classes, community service, and comprehensive case management. Also, the interns gain valuable leadership skills such as planning, organizing, and implementing community engagement projects. The objective is to empower individuals to become more mature and able to take care of themselves and their families by providing them the skills required for future education and to help them to find and keep a job that reduces the risk of long-term poverty.

Workforce profile. The client and project organizations are located in the mid-Atlantic region of the United States, which has one of the highest proportions of young people between the ages of 16 and 24 out of school or work. About one in five are disconnected, and 38% have no high school diploma or GED diploma (Seltzer, 2016). Also, according to Seltzer (2016), 79% of people between the ages of 16 to 24 in this region are African Americans. Addressing the youth situation in this region requires community leaders, nonprofits, and businesses to coordinate workforce development programs. At-risk youths participate in the client organization's year-long growth development and job readiness program. The main criteria for hiring someone is that they show a willingness to invest in themselves: They show up on time, pay attention to training sessions, meet with their mentors, and fulfill job duties.

The client's information I reviewed compared the demographics of the neighborhood to the city overall. The demographics included total population (all ages); age distribution; percentage of men versus women; race/ethnicity distribution; percentage of children (younger than 18 years) living in single-parent households among all children living in family households; percentage of residents with no health insurance (age 18 and older), and children (younger than 18 years) with no health insurance; and the household income distribution (Table 2).

Table 2

The Demographics of the Neighborhood Compared to the City Overall

Total Population (all ages) of the Neighborhood Compared to the City Overall.		
	Neighborhood	City
Total population	9,285	622,454
The Age Distribution of the Neighborhood Compared to the City Overall.		
	Neighborhood	City
17 or younger	24.6%	21.2%
18-24 years	13.4%	11.3%
25-44 years	27.9%	30.1%
45-64 years	20.8%	25.3%
65+ years	13.3%	12.1%
The sex Percentage of Males and Females in the Neighborhood Compared to the City Overall.		
	Neighborhood	City
Male	45.5%	47.1%
Female	54.5%	52.9%
The Race/Ethnicity Distribution of the Neighborhood Compared to the City Overall.		
	Neighborhood	City
African Americans	88.4%	62.8%
White Americans	8.1%	30.3%
Asian Americans	2.1%	2.6%
Other race*	1.0%	2.0%
Two or more races	0.4%	2.3%

Hispanic or Latino Americans	1.2%	4.6%
Percentage of Children aged less than 18 years old living in Single-Parent Households Among all Children Living in Family Households in the Neighborhood Compared to the City Overall.		
	Neighborhood	City
Percentage of children in single-parent households	94.3%	64.8%
Percentage of Residents with no Health Insurance (aged 18 years and older) and Children aged (less than 18 years) who lack Health Insurance in the Neighborhood Compared to the City Overall.		
	Neighborhood	City
Percentage of adults 18 years and older with no healthcare insurance	3.2%	11.l7%
Percentage of children under 18 years with no healthcare insurance	2.8%	4.4%
The Household Income Distribution of the Neighborhood Compared to the City Overall.		
	Neighborhood	City
Median Household Income	$14,105	$41,819
Percentage of all households whose annual household income is in the following range:		
Up to $24,999	66.5%	32.2%
$25,000 - $39,999	10.9%	15.4%
$40,000 - $59,999	10.7%	16.5%
$60,000 - $74,999	2.9%	8.9%
$75,000 and over	9.0%	27.9%

*Note. *Other race* includes American Indian or Alaska Native, Native Hawaiian or Other Pacific Islander.

Assets. The primary form of assets in most industries are tangible assets. Resource-based view (RBV) posits that companies control specific resources under various categories that can potentially contribute to enhanced performance and sustainable competitive advantage (Othman, Arshad, Aris, & Arif, 2015). The client organization’s assets include different types of technology and equipment such as a computer, coffee maker, espresso machine, coffee grinder, milk, water, refrigeration system, containers, pumps for syrups, ovens, toasters, shelving to store coffee, mugs, coffee equipment, freezer and cold product storage, industrial blender, and POS system and related hardware for efficient and reliable point of sale.

Regulatory requirements. Nonprofit businesses must follow state and federal laws (National Council of Nonprofits, 2020). The leaders of the client organization and the project organization must follow state and federal laws regarding nonprofits. Regulatory requirements are partly taken care of by having the project organization as the fiscal agent. The website reviewed showed there are over 32,000 nonprofits in the state the client organization is situated. One out of 10 workers in the state is employed by a nonprofit. Approximately 27.9% are volunteers, and $5.3 billion are donated by the state residents to charity annually.

The state's association for nonprofit organizations where the client organization is situated has established standards for excellence to certify or register leaders of nonprofits who follow the standards. The state's association for nonprofit organizations offer services and education programs to assist nonprofits, information on good governance, fundraising, and more. As for health and safety regulations for the restaurant sector, the Office of Food Protection's mission is to make sure the safety of food. The office reviews licenses and inspects food manufacturing facilities in the state. The Office of Food Protection works with local health departments, other state agencies, and the federal government to participate in policymaking, training, and information sharing (U.S. Food & Drug Administration, 2019).

Organizational relationships. The leaders of the client organization's social mission aim to create opportunities for local youth and to build the community. According to Alvarez-Gonzalez et al. (2017), the development of cooperative relationships with internal and external stakeholders, including alliances with other organizations, is critical for nonprofits to ensure mission accomplishment and long-term survival. Also, according to Alvarez-Gonzalez et al. (2017), nonprofit organizations confront competitive pressures derived from complex economic and societal issues such as retaining and engaging funders using a good marketing strategy, sustainability, and not enough resources. The collective efforts of the leaders of nonprofits, foundations, businesses, government, and communities are required to cooperate in addressing these economic and societal issues to develop robust solutions. Having organizational relationships with staff members that are fully absorbed and enthusiastic about their work who take affirmative action to further the organization’s reputation and interests is vital to achieving sustainability. By creating strong organizational relationships with staff members, leaders of the organization can build a quality collective team and develop bonds that might help the organization be successful. Effective business relationships allow for understanding; the exchange of information increases knowledge, useful feedback, and develops rapport.

Organizational structure. Organizational structure is the framework of the association on jobs, systems, operating processes, people, and groups making efforts to achieve collective goals (Ahmady, Mehrpour, & Nikooravesh, 2016). Management structure determines the relationships between the different activities and the members. Roles, responsibilities, and authority are assigned to the members to carry out various tasks. The organizational structure follows strategy, the client organization, and the project organization leaders of divisions, departments, teams, processes, and technology designs are to achieve the organization's mission, vision, and values. The client organization's staff and board of directors include owners, managers, delivery drivers, and committee members for business strategy and marketing. The client organization's advisory board consists of an executive director, vice president, treasurer, teacher, and other members. The project organization staff and the advisory board consist of an administrative directive director, youth services specialist, program and advancement officer, and committee members for fundraising, strategic planning, and marketing.

Customers and stakeholders. Stakeholders can provide leaders of business hands-on and financial support. According to McGrath and Whitty (2017), stakeholders can include investors, employees such as owners, managers, workers, customers, and suppliers who are involved with an organization, community, or society and therefore has interest and responsibilities toward the accomplishment of aim or purpose. The client organization is a social enterprise coffee shop in which leaders of the company work directly with the project organization as nonprofits dependent on financial donations for funding. Volunteers help to lead and maintain community outreach programs and employee development classes. When consumers make purchases from the client organization's personnel, including catering services, the leaders' profit from the client organization goes to the leaders of the project organization to support their mission to change lives in the community.

Suppliers and partners. When leaders of an organization develop a strategic plan for a company's social purpose, external players such as suppliers and partners need consideration. Finding and building strategic supplier and partner relationships plays a crucial role in service sustainability. A leader's chosen suppliers provide a needed product or service. A leader's chosen partners engage together in the same activity. A significant key to success is for the leaders of the organization to select the right suppliers and partners relationship for each business need. Choosing the right suppliers and partners relationship involves factors such as value for money, quality, reliability, and service (La Rocca, D'Abrissel, Perna, Snehota, & Ciabuschi, 2019). A good question for leaders of the organization to ask is: Which of these potential suppliers or partners will serve the mission, as well as make effective and efficient use of scarce resources? According to La Rocca et al. (2019), the development of a critical initial supplier's relationship starts from open-ended expectations of reciprocal future relational benefits. The relationship involves interaction between the parties in a stepwise process toward defined solutions. Consumer surveys support social causes and nonprofits, 78% of Americans believe a partnership between a nonprofit and a company they trust makes a purpose stand out, 59% of Americans are likely to purchase a product associated with a nonprofit (Rim, Yang, & Lee, 2016). The client and project organizations present, and past funding partners include multiple corporate partners.

Organizational Situation

Organizational situation refers to a company's strategic position (Baldrige Performance Excellence Program, 2017). The leadership position involves the internal and external factors of a business. Some internal factors include organization, organization structure, productivity, and objectives of the company, whereas some external factors include political, economic, technological, and demographic. The organizational situation describes in more detail relevant facts about a business's competitive environment, competitive position, competitiveness changes, comparative data, strategic context, and performance improvement system, which follows.

Competitive environment. The leaders of the client organization are struggling to sustain business due to the lack of funding sources using an effective marketing strategy. The competitive environment in which the SMB operates affects their chance of survival. According to Olanipekun, Abioro, Akanni, Arulogun, and Rabiu (2015), despite that organizations operate in turbulent and highly competitive environments, leaders of businesses desire to continue to work successfully by creating and delivering superior value to their customers while adapting to a dynamically changing business environment. According to Olanipekun et al. (2015), the competitive environment has become complicated. The competitive climate justifies experienced knowledgeable individuals in decision-making, which requires strategic management to identify the organization's mission, vision, objectives, developing policies, plans, projects, and programs designed to achieve goals.

Competitive position. The size and scope of the U.S. restaurant industry include $863 billion projected sales, over 1 million locations, 15.3 million employees, 1.6 million new restaurant jobs created, and 10% restaurant workforce as part of the overall U.S. workforce (National Restaurant Association, 2019). The competition is one of the most influential factors that affect the competitive strategies of an organization (Moisescu & Golomoz, 2018). According to Teofana and Dimitrova (2017), the ability of an organization to create value that is different from the value offered by its competitors and is essential to consumers ensures the business a unique strategic position.

There are three main competitors where the client organization situated and competes. One of the competitors is a for-profit organization, and the other two competitors are nonprofit organizations. The for-profit competitor is considered one of the world's largest coffeehouse chains, which aims to make a positive impact on society by bringing people together in the communities. One of the nonprofit competitor's objective is to develop a training and workforce development program for economically rising men and women in the region. The other nonprofit competitor has positioned social cafés, providing on-the-job training to opportunity youths.

Competitiveness changes. Strategic management is involved in deploying a firm's internal strengths and weaknesses to take advantage of external opportunities and minimize external threats/problems (Olanipekun et al., 2015). According to Gurel (2017), SWOT Analysis is an analysis method used to evaluate the strengths, weaknesses, opportunities, and threats involved in a business, a plan, a project, a person, or a business activity. I have described some fundamental changes that affect the leaders of the client organization's competitive situation, which creates opportunities for innovation and collaboration.

The location or neighborhood of the client organization affects its sales. For example, the local college and university are nearby. Because the local college and university are in a safer environment, people prefer to shop there to ensure their safety. Segregation, where the client organization situated, is a real thing. Because the leaders of the client organization have chosen to put their locations in places that many people avoid or want to drive through, it makes it less likely that someone would come in and get to experience the company's products and services. The leaders of the client organization have situated the companies in these locations due to affordability.

The client organization's program advancement officer emphasized that a critical change that has created an opportunity for the leaders of the company is to develop relationships with the local customers. The neighbors get to know the youths in the community through conversations while they are in the store. The neighbors come in and talk to the youths and get to know them and become invested in their stories. For example, some youths needed supplies for college; the personnel at the client organization set up a drive to get supplies for the youths to start college. During the drive, the people in the neighborhood approached the youths as customers. The people in the neighborhood had before interactions with the youths in the coffeeshop, some of the neighborhood people knew the youths by their names; they were excited about their next steps to job interviewing and starting college. Products or donations from the neighborhood drive included items for their dorm rooms and hygiene products.

The program advancement officer is the writer and presenter of grant proposals for potential funders, who have experienced with low staff capacity, building relationships with potential donors lack. An opportunity for leaders is to develop a relationship with potential funders before and after the initial grant proposal. According to Berman and Chandler (2017), an outstanding funder-nonprofit relationship is open, honest, transparent, trusting, authentic, transforming, flexible, two-way, accountable, collaborative, inspirational, sustainable, mutually beneficial, adaptable to change, open to taking risks, and strategic. The program advancement officer emphasized that after the presented formal proposal, it would work in the organization’s best interest for the executive director to cultivate the relationship. Funders and nonprofits can work together from transactional to transformational relationships by sharing mistakes, be less defensive and open to bigger pictures beyond individual programs, connect each other to resources, listen, learn, and be open to multiyear funding (Berman & Chandler, 2017). If, after the formal proposal, the leader of the client organization does not receive funding, it would be good to continue the relationship with the potential funder because the leader of the client organization might be able to receive funding in the future.

Comparative data. The identification of top competitors and understanding the competitive market environment, as well as the restaurant's SWOT analysis, leaders of organizations can make better strategic decisions. The leaders of the client organization and their three main competitors are similar in that all compete with a variety of beverages, healthy food choices, provide the opportunity for catering services, and are socially driven companies. The two nonprofit competitors have included a social mission statement on their websites that describes how their brand attracts employees, customers, and other stakeholders to connect and address the needs of disadvantaged people who face social and economic challenges. According to Gao, Tang, Wang, and Yin (2018), knowing the competitor and competitive advantages will facilitate the success of leaders of businesses. Many efforts are dedicated to set up strategies and operating procedures to obtain a competitive edge and enhance performance against competitors. The National Restaurant Association's (2019) state of the restaurant industry report (Table 3); includes five trends showing advantages and disadvantages that influence the restaurant industry.

Table 3

State of the Restaurant Industry Report

Trends	Advantages	Disadvantages
2019 sales and economic forecast	-Industry sales projected to reach $863 billion -Consumers remain generally optimistic about their finances, this confidence, along with a healthy household balance	-Outlook on energy prices and food costs trends in menu price growth.

	sheet, should lead to additional consumer spending. -Business views or attitudes are decidedly positive	
Table service and limited service restaurant Trends	-Although on-premises traffic still represents the majority of business in the table service segment, the growing demand among consumers will make off-premises options important drivers -Restaurant operators across all sectors will focus on building business among younger consumers in the years ahead. To attract these tech-savvy consumers, a majority of operators expect to devote more resources to both social-media marketing and electronic marketing -Included: Snapshots of takeout, delivery, and catering trends, also opportunities and trends in the breakfast, lunch, and dinner dayparts.	-The vast majority of operators say they think competition from other restaurants will hold steady or become even more intense.
Workforce trends	-With total restaurant and foodservice employment projected to top 15 million, recruiting and retaining employees will be among the top challenges faced by many operators. More than a third of operators have job openings that are difficult to fill, with the most significant challenge finding applicants for back-of-the-house positions. -The restaurant industry continues its role as a training ground for new entrants to the workforce and a place for upward mobility.	-The restaurant industry also continues to be impacted by longer-term structural changes in the labor force. The recent uptick in teenage restaurant employment may be short-lived, with long-term projections calling for a shrinking teen labor force in the years ahead.

Technology trends	-Restaurant operators are planning to ramp up their investments in technology, with the most common focus being customer-facing service-based technology, such as online or app ordering, reservations, mobile payment, or delivery management. -Emerging technologies that rate the highest among consumers include service-enhancing items such as tablets at the table, self-service electronic kiosks, and wearable technology for restaurant servers.	-While most consumers currently use some amount of technology in their restaurant experience, there is an appetite for even more advancements. A majority of consumers say they would like to see restaurants incorporate more technology with a focus on improving customer service, making ordering and payment more accessible, and offering more convenient takeout and delivery options.
Food and spirit trends	-Chefs predict that restaurant food and menu offerings will be influenced by zero-waste cooking, hyper-local sourcing, veggie-forward cuisine, and natural ingredients**.** -Local sourcing, healthy options, and eco-friendly food are increasingly important to consumers, and a majority of them say the availability of these options factors directly into their choice of a restaurant.	-A majority of adults say they are spending more time at home watching on-demand television and videos. At the same time, they expressed an interest in purchasing quality food and ingredients from their favorite restaurant, with instructions on how to cook a meal at home.

Note. From National Restaurant Association. (2019). *State of the Restaurant Industry*. Retrieved from https://www.restaurant.org/research/reports/state-of-restaurant-industry

Five trends of the restaurant industry in 2019 include a competitive business environment, recruiting and retaining employees, consumer demand remains elevated, and technology adoption grows. According to Gao et al. (2018), some key sources of comparative data that are available outside the restaurant industry include publicly available data in social media. Using data in social media enables the identification of competitors, evaluate the market environment, and help the leaders of the restaurant of interest to develop a service improvement strategy. Also, a limitation, addressed in the limitations section of my study, is the data source was collected and analyzed from a variety of nationwide surveys among restaurant owners, operators, chefs, and consumers. The method may not be generalizable and, therefore, may not apply in all industries (National Restaurant Association, 2019). See Assumptions, Limitations, and Delimitations component of Section 2.

Strategic context. The economic progress, the competitive environment, the economic and financial problems determine the leaders of an organization to identify the best solutions to cope with the conditions. The leaders' strategies decided to affect the company's development or its survival (Moisescu & Golommoz, 2018). An organization's key strategic challenges and advantages can come in the areas of business, operations, societal responsibilities, and workforce.

A strategic challenge at the client organization is staff capacity. Three staff members work with the project organization, a case manager who essentially is the social worker. Because the case manager is the social worker, her assignments are full working with the youths at the client organization and working with the project organization is additional work. The executive director and the program advancement officer are involved in the development of grant proposals, project management, tracking the data, community relationships, and community projects. The executive director does all the financial work for both the client organization and the project organization while managing the business at the client organization. The staff is stretched thin, and that makes it difficult to do some of the assigned duties.

From a financial perspective, the leaders of the client organization's finances are not liquid enough to handle large accounts. For example, on the condition that a consumer orders a large catering order, the leaders of the client organization need a deposit to pay for the supplies and the food that goes into doing the job. Sometimes even a deposit is not enough. A lot of the larger organizations go through an invoice system where you're supposed to invoice them, and they pay you back by way of check. The problem is it takes weeks or months after job completion to get paid, the leaders of the client organization finances are not liquid enough to pay for the expenses before invoicing the client.

From a marketing perspective in catering services, the client organization’s program advancement officer explained that he tried to set up a catering deal with an organization every week on a particular day and deliver lunch for free. By setting the catering deal up the day before, the leaders of the client organization would know they have an order in advance and could schedule people to work on that order. For example, the leaders of the client organization have worked with a local nonprofit business nearby. Every Friday, the personnel of the client organization would deliver lunch to them. The local company would use the client organization’s online store, in which they could put in their order the day before, say on a Thursday. Then the staff of the client organization filled the order on Friday and delivered the lunch to the customer. This business arrangement was tried but did not work out because there was not enough work or other customers ordering every week to be productive. The opportunity was there, but the leaders of the client organization needed customers from larger organizations to get the online catering service to be productive. The online catering service required a robust plan. According to Hard (2019), social networking tools such as Twitter and Facebook are excellent ways to begin promoting your catering business.

Societal responsibilities, particularly advocacy, the client organization's program advancement officer has explained that changing how their leaders of the company and other nonprofit organizational leaders communicate to potential funders about their youth workforce programs can vary. Because of the difference in workforce programs, funders cannot support all nonprofit organizations the same. Particularly, donors cannot look to support our organization for a 3-month program period when it's a 12-month program. A financier may think a 3-month plan program for our company makes sense for youth, but with a lack of funding for a 12- month program, the company leaders have a lot of financial pressure to change the plan. The problem is the leaders of the client organization know the 12-month program here works, but the organization is not getting the funding it needs. According to Fritz (2019), nonprofit advocacy takes a long time. It takes continuous effort to get representatives, policymakers, the community, donors, and other stakeholders engaged. It is more about education and promotion of services than trying to make a particular legislative change.

Performance improvement system. Unlike the private sector organizations that measure results based on financial goals, nonprofit organizations make profits to help the society. When defining and measuring outcomes for nonprofits or federal agencies, they are required to act under complex statutes, regulations, executive actions, or case law that not only govern their programs but define Federal employment (U.S. Office of Personnel Management, 2019). Nonprofit organizations operate with laws governing employers. According to Olanipekun et al. (2015), the critical process to achieve organizational vision, strategy, and objectives is through strategic management. Leaders should perform a continuous process that evaluates their competitors, goals, and plans to meet and beat existing and potential competitors, then reevaluate strategies regularly.

Total quality management (TQM) is an excellent approach to quality in a business that seeks to improve quality and performance, which will meet or exceed consumer expectations. A key component of TQM is the principle of continuous improvement (Martin, 2019). According to Martin (2019), some tools to use to ensure the success of TQM include process mapping, root cause analysis, and the plan, do, check, and act (PDCA) cycle. A continuous improvement effort involves strategic management's accurate understanding of the process identified for improvement. The process mapped to identify the flows that make up the process. For example, the client organization’s marketing strategies include business processes, in which products and services are advertised or promoted to potential customers. The mapping of the different business processes of advertising or promotion involves identifying and writing down the physical and information flows. The process mapping will illustrate the flows graphically in the process from start to finish, which will include activities, personnel, and the outcomes. The process map can define the scope of the process, the interface with other methods, and a starting point for measurements of improvement (Martin, 2019).

Root cause analysis is the technique in which a business will determine the root cause of a problem or quality concern. Identification of the root cause can be achieved in three phases: open phase, narrow phase, and close phase (Martin, 2019). The open phase allows strategic management to brainstorm the issue or problem to identify possible root causes. A cause and effect diagram can be a useful tool to help during brainstorming. During the brainstorming process, the team identifies the root causes associated with the cause and effect diagram. For example, the client organization's root cause categories are funding sources using a good marketing strategy. The team can then organize their ideas for the root cause of funding sources and marketing strategy categories.

Regarding the narrow phase, the team chooses the possible root causes of what they want to change. Each likely root cause is singled out and discussed in more depth to determine its problem areas. As for the close phase, the team comes into an agreement on a root cause(s), which involves validating the root cause(s) based on measurable data or subjective evidence from interviews with staff, customers, or vendors (Martin, 2019).

The PDCA cycle involves four phases, which is a simple approach for carrying out change (Martin, 2019). The first approach refers to plan; after the root cause analysis, and the identified problem that needs to be changed, strategic management will then plan how to apply improvements. The second approach refers to do; after the planning phase, strategic management will proceed with the proposed changes or address the problem identified in the root cause analysis. The third approach refers to check; after strategic management has followed the plan and made changes to solve the issue. The check phase is crucial to validate the changes made to have the required results. If not, then strategic management will need to start the PDCA cycle again at the planning stage to develop a new plan to attain the necessary results. The fourth approach refers to act; once the issues have resolved, strategic management should incorporate the changes into their standard operating procedures.

Leadership Triad: Leadership, Strategy, and Customers

It is crucial to a leader’s organization's success that leadership focus on strategy and customers. Leaders strategically plan the success of an organization by starting with its mission, vision, and value statements (Price, 2019). A leader’s company’s mission statement reveals the purpose of the company. A leader’s company’s vision statement is its thought process that defines the company’s goals and fuels the mission statement. A leader’s organization’s value statement makes known the customer type, target markets, business activities, or things the company does or not support.

Leadership

Leadership defined as a behavior, a style, a skill, a responsibility, an experience, a function of management, a position of authority, influencing a relationship, a characteristic, and an ability (Wajdi, 2017). According to Bogle (2018), organizational leadership is a management approach in which leaders help set strategic goals for the organization while influencing employees within the group to willingly focus on the organization's mission to achieve assignments associated with those goals. The leader accomplishes this influence by conveying the organization's vision of the future to employees so they can understand the leaders of the organization's beliefs and values to gain agreement on present-time action steps. Leaders use ethical means or avoid activities that harm the process of action steps with employees to bring about their best interest. Leaders motivate employee development through education, training, and support. Leaders make sure that processes and people are aligned with the customer to adhere to the workforces' commitment to meet and exceed customer expectations about product and service quality. Leaders recognize that the unity of diverse employees can breed a more creative, innovative, and productive workforce. The overall strategy of the leaders of the client organization is to lead with its mission, vision, and value statements to achieve the organization's goals.

Senior leadership. Senior leadership refers to the top management team in an organization that is responsible for the overall performance of the business. They define the mission, vision, values, set organizational goals, and make major corporate decisions and report to shareholders (Dorling, 2019). The client organization's senior leadership team includes a founder who is also the executive director, a cofounder, a copartner, and a program advancement officer. According to Hegarty (2015), leaders that focus on their mission experience higher levels of performance and return on equity than those without one. Therefore, if an organization's mission is related to company performance and developed by senior management, then leadership priorities impact performance. Senior leaders must improve their leadership skills, foster innovation, create a climate of openness, learn to manage managers, remember that character influences the willingness of others to follow them as their decision-making has a strong effect on organizational performance (Hegarty, 2015).

Governance and societal responsibilities. Governance is a crucial component of the leadership of nonprofit organizations, and the Board of directors that engage in the work of governance are critical to the success of the organizations they serve (Renz, 2016). Financial indicators are not enough; leaders of companies must manage nonfinancial ones, be they ethical and moral in their business. The connection between social responsibility and the leaders of company governance is the answer to the questions that exceed economic, technical, and legal completions (Juric, Zupanc, & Strukelj, 2019). The Board of directors of a company provides the framework for corporate governance involving balancing the interests of a company's many stakeholders, senior leadership, suppliers, financiers, the government, customers, and the community. The legal, regulatory, organized support structure and transparency toward a leader's decision-making of a company can shape an organization's reputation, long-term success, and good business ethics. The client organization's Board of directors serves on the committees of business strategy and marketing.

Strategy

A leader's organizational strategy is about making choices regarding a plan of action to achieve desired goals. An approach is a way to ensure sustainable competitive advantage by investing the resources needed to put in place key capabilities to achieve long-term success (Anwar, Shah, & Hasnu, 2016). The sum of actions a company has set out to achieve its long-term goals is the company’s strategic plan. According to Price (2019), decisive leadership refers to the involvement of individuals from all levels of management and staff collectively collaborating and planning about an organization's direction and how it will get there.

Strategy development. Strategy development or strategic planning requires organization leaders to articulate both the decisions made about the company’s goals and how the organization will achieve those goals. The strategic plan serves as the director of a leader’s decision-making, moving forward (Newcorn, 2018). According to Price (2019), companies achieve their goals by setting their goals. Methods used for strategic planning include the mission statement or marketing strategy. Organizations then further detail their mission statements by adding vision and value statements. The strategic plan helps to achieve an advantage for the leaders of the company through its alignment of resources within a challenging environment to reach the stakeholder’s expected value successfully. A strategic plan is a useful tool developed by senior leaders in managing the company if successfully brought into practical action.

Strategy implementation. Strategic senior leaders are vital for effective strategy implementation. Lack of strategic leadership in an organization is one of the significant obstacles to effective strategy execution (Palladan, Abdulkadir, & Chong, 2016). Several identifiable actions and features qualify positively to strategic leadership. According to Palladan et al. (2016), qualities that contribute positively to a leader's effective strategy execution include identifying the strategic direction to follow, setting and establishing standard organizational controls, managing corporate resources effectively, maintaining an active corporate culture, and emphasizing ethical practice. Strategic management practices implemented by the organization set to achieve an organization's goals and objectives must be monitored in standardized intervals to make sure that the company is on the correct path leading to vision and mission (Alles & Yazdanifard, 2017).

Customers

Marketing strategy is a method that leaders of an organization can use for strategic planning concerning the customer to provide an edge over its competitors (Price, 2019). It is an aspect of marketing planning based on a leader's company vision. A marketing mix helps leaders of organizations identify and understand the needs and wants of customers. Product, price, place, and promotion are factors that guide leaders of business towards success or failure. Understanding the leaders' marketing requirements of the company's product secures a competitive position (Nuseir & Madanat, 2015). Customers' purchase of products is affected by his or her beliefs about product quality, price, and how convenient it is to get the product. A leader's marketing strategy consists of mixed, unique, and engaging marketing initiatives designed to bring about financial growth and allow the sustainability of organizational growth. Leaders' managing the marketing mix properly brings success to the organization and is a valuable source to meet the expectations of a customer. For example, by advertising on the company's website, a *Customer First* policy, to provide quality food, beverage, and catering choices with exceptional service. Also, to give back to the community through participation in community service endorses a leader's commitment to customers using marketing strategy,

Customer expectations. The voice of the customer (VOC) refers to either a tool or process for capturing customers' wants and needs or as the customers' needs and wants themselves by way of focus groups, interviews, or surveys (Abramov, 2015). VOC provides feedback about customer experiences with a company's products or services. Quality means meeting the customer's needs by delivering exceptional value. However, to meet the customer needs, require that those needs be understood. Understanding, analyzing customer needs, and obtaining the VOC is one of the strategies used for developing and improving products and services (Sachamanorom & Senoo, 2016). According to Lemon and Verhoef (2016), customer experiences are more social. Customers interact with businesses in large numbers through multiple channels and media. Using multiple channels and media requires the integration of various business functions and external partners in creating and delivering positive customer experience. Customers want to know their voice matters. The National Restaurant Association's (2019) state of the restaurant industry report (Figure 1) includes national statistics for VOC consumer trends by the numbers in the restaurant sector.

Figure 1. *National statistics.* From National Restaurant Association. (2019). Retrieved November 1, 2019, from https://www.restaurant.org/research/restaurant-statistics/restaurant-industry-facts-at-a-glance

Customer engagement. Customers look forward to engaging and doing business with leaders of brands that care. Leaders of brands who care are the VOC driven and create customers who care, spend, and stay. Some examples of how leaders of an organization can drive VOC includes a multichannel mix by way of brand messaging through online advertising of events and menus, email, printed materials such as brochures, in-store advertising, word-of-mouth marketing, and social media. Social media is used for audiences to engage with organizational staff about compelling content on Facebook, Twitter, Instagram, Snapchat, and Nextdoor. For example, in the case of the client organization, staff can post recipes and pictures of the youth's graduations. A corporate leader who aims to stay engaged with the customer to provide excellent customer service experience, might reduce complaints and increase the number of repeat customers. Leaders of the organization using value statements can be a leading force for staff in decision-making about problem-solving and helping customers. Leaders using value statements declare a company’s top priorities and core beliefs, both guide staff actions and a way to connect with customers (Cameron, 2018). Leaders using the VOC and value statements are best practices intended to earn long-term loyalty and repeat business, gain competitive advantage, and stay on track for success.

Results Triad: Workforce, Operations, and Results

Business process management refers to an integrated set of corporate capabilities related to a leader’s strategic alignment, governance, methods, technology, people, and culture (Brocke & Rosemann, 2015). Process management involves leaders of the organization's strategic planning, analyzing, designing, implementing, and managing critical organizational processes required to achieve a high level of performance. Identify opportunities to continuously improve critical regulatory processes that affect operational performance and, primarily, customer satisfaction. A leader’s workforce optimization and improving critical regulatory processes that affect functional performance and customer satisfaction can help an organization be more productive.

Workforce

Workforce refers to people working or available for work in a single company or industry (National Restaurant Association, 2019). Rising labor and tax legislation costs, increased competition, and workforce development are issues and challenges faced by leaders of SMBs in the restaurant industry. Notably, with unemployment rates at a record low, increased growth at restaurant brands, and a reduced number of young, skilled workers applying for jobs, a business leader must find ways to attract, hire and keep employees (National Restaurant Association, 2019). Workforce development refers to employment initiatives provided by leaders of businesses and government programs. New training and certification programs assist a business leader in developing its workforce for the long-term by closing the skills gap (National Restaurant Association, 2019). Leaders of businesses support workforce development because it is crucial in creating, sustaining, and retaining a qualified workforce, by supporting workforce development in the local communities SMBs leaders can create social and economic prosperity (Wiki, 2017).

Workforce environment. Workforce environment refers to how well leaders of an organization acknowledges and rewards employee performance, help employees, respond to their concerns, and gives guidance to employees (Koys & Decotiis, 2015). The work environment influences how employees feel about their work, such as the organizational culture, relationship with colleagues and management, and room for professional growth. A supportive work environment is key to bringing into existence a productive organization and employee job satisfaction. An employee can openly come to their leaders regarding opportunities for advancement and also their problems knowing that they care about the issues they face and their future with the company. According to Koys and Decotiis (2015), a supportive work environment moderately relates to employee turnover, customer satisfaction, and safety, in which it refers weakly to outcomes such as sales and profit.

Organizational culture refers to the tangible personality originated inside the company and is influenced by leadership. Leaders who were culture-focused in their organizations increased their income over 11 years by 682% versus 166% for leaders that did not focus on their culture (Morcos, 2018). According to Franco-Santos and Gomez-Mejia (2015), a leader's reward systems such as a particular monetary return or recognition has a significant impact on the cost side of an organization's financials. A leader's reward systems are strategic as they affect people's attitudes, behavior, and performance. For example, a salesperson improves customers' satisfaction scores, in return, rewarded with a $500 bonus or recognized in front of their colleagues and management as the top performers of sales in the company. Upon proper administration, communication, and employees fully understand the system and the company's business goals, a leader's reward or recognition program can make employees feel motivated about coming to work and gain profitability for the leaders and stakeholders of the business.

Workforce engagement. Workforce engagement refers to the concept of organizational citizenship behavior or an employee's eagerness for helping, including business compliance, integrity, civic virtue, business loyalty, self-development, and individual initiative (Guenole & Feinzig, 2019). An engaged employee is passionate about his or her work, which leads to high performance and puts forth organizational citizenship behavior (OCB) or extra-role behavior. The employee supports team spirit among members of a team by enabling them to cooperate and work well together through their issues and problems, which makes them want to do well. An engaged employee's OCB promotes a leader's positive company culture, helping others solve problems, sharing critical resources and information, adhering to rules and regulations, and supports decisions for a better chance, which aids in achieving individual productivity and organizational effectiveness (Pradhan & Jena, 2016). An engaged employee's OCB reduces attrition of highly skilled workers, and the inclusion of strategic management sound principles of work design, make sure the work experience is relevant and fulfilling (Guenole & Feinzig, 2019). According to Shaban (2016), more businesses recognize the value of coordinated efforts of employees; it is the best way to meet customer satisfaction, higher quality products, and faster service challenges. As a result of more top-quality products and increased appreciation of the customer, the leaders of business makes more profit, which can put more income in the pockets of the working people in the local communities. Increasing the revenues of the leaders of companies and people in the local communities could allow for civic engagement through responsible investing and charitable giving.

Operations

Operations management refers to the selection and management of transformation processes that create value for society (Shepherd & Patzelt, 2017). Transformation processes occur in actions in which workers perform any activity or group of events by taking an input(s), add value to it, and produces a specific product or service for customers. Transformation processes represent the main activities that a leader of a company needs to fulfill to execute its business successfully. For example, a leader’s transformation processes can include changes in structure, management, employees, operations, materials, information, or customers, and other related activities. A leader’s operational changes and processes are inevitable and unavoidable (Jalagat, 2016). Leaders need to understand the concept of TQM effort, in which all members of the company take part in improving processes, products, services, and the culture they work before beginning to develop operational processes. According to Busu (2019), a leader’s performance management is the direct result of a relationship between a leader’s integrated operational processes, trade strategies, and policies, integrated operational management, corporate social responsibility, motivated workforce, knowledge, and competencies.

Work processes. Work processes conveyed by the leaders of an organization require clear expectations on how to perform the work. The leaders of the organization’s work processes define tools needed for the job, systems, and resources, as well as who should perform the task (Jie, 2017). For the staff to deliver work effectively, work processes conveyed by the leaders need to line up with a company’s resources, such as a supply of money, materials. The efficiency of the work operations depends on leaders of the organization workflow, which leads to more significant bottom-line profits. The effectiveness of the leader's works operations saves overall employee time. Employees following an ethical, transparent work process streamline work and develop their competencies in workforce skills and leadership capabilities. An advantage for leaders of SMBs is to continually invest in their people's training and development to acquire the right skills and keep them motivated. The leaders of SMBs can achieve financial and operational advantages from streamlining work processes.

Operational effectiveness. Operational efficiency is critical to a leader’s organizational success. What operational effectiveness means is that an organization is more efficient in performing similar tasks than their competitors. The key is for leaders to acquire knowledge about the right tools and strategies and use them in an effective manner (Mahdi, Nasar, & Almsafir, 2018). For example, tools and strategies that are critical to the client organization and the project organization to achieve operational effectiveness include: align your initiatives, align budgets and performance, structure follows approach, engage staff, and monitor and adapt. The client organization’s participation with the project organization is project-driven, the need to ensure that a framework is in place helps to make sure alignment between the project and strategy for long-term success. A strategic alliance between the leaders of the organization helps to make sure that resources allocate correctly. Leaders must align budgets and performance because it presents the primary purpose for which funds are allocated and sets measurable objectives, for example, funds distributed for business purposes such as personnel, program, and operations costs.

Team building is a continual process that leaders of a workgroup develop gradually into a cohesive unit by sharing expectations for accomplishing tasks, work processes, use of technology, trust, support, and respect for another's individual differences. Monitor and adapt refers to a process in which leaders help improve performance and achieve results. Leaders use the monitor and adjust the approach to assess the performance of projects and institutions and programs set up by governments. According to Jensen and Pirasteh (2016), we have all heard the saying, "the only thing constant is change" (p. 1). If you are a leader of an organization looking to improve your production to increase revenue or achieve other organizational goals, change can get you there. The need for change may occur in a leader's strategies, goals, technology, government regulations, competition, and other things that make an impact within the organization.

Measurement, Analysis, and Knowledge Management

The leaders of SMB nonprofit organizations are demanded from donors and grantors, such as foundations, to provide proof that what they are doing achieves their goals (Fritz, 2019). Donors and grantors want to know the outcomes of measurement, reporting, and transparency from the money they donated to validate the value of their support. Foundations look for organizations that are data-driven and results-oriented (Fritz, 2019). Leaders of SMB nonprofit organizations must be able to describe the processes for measurement, analysis, knowledge management, and report the results of their performance to the funders who provided support.

Measurement, analysis, and improvement of organizational performance. The leaders of the organization are responsible for reporting work performance or evaluation to show performance at reliable and successful levels to stay in business. According to Tatian (2016), two frameworks for using data and evidence are performance measurement and evaluation. The leaders of the company report performance measurement, which shows the program's make-up and how well it performed. In this study, a leader's company performance measurement or evaluation of a youth's success or progress enables the leaders of the organization to demonstrate improvement. A leader's organization performance measurement or evaluation can serve as an example of an SMB organization to model funding sources and marketing strategies. The leaders of the company must document the level of success in achieving objectives for the youths. The leaders of the organization report in summary guidance regarding assessment that tells the program's results on the people, families, or communities.

Information and knowledge management. Information management is the process of strategic management supervising data collection for storing, managing, and maintaining information. Knowledge management is a strategy used by leaders to get the right knowledge to the right people at the right time to improve organizational performance (Girard & Girard, 2015; Hlatshwayo, 2019). Wisdom comes through experience or education, such as facts, information, descriptions, or skills. It helps to have a variety of information. Data is new knowledge, which leads to change in the actions of people exposed to it (Abdullahi, Olalekan, Igbinovia, &

Solanke, 2015). Information and knowledge management are crucial for strategic management. To provide the ability to locate and organize relevant information to create value required for specific business tasks, projects, assessment, sharing, and the creation of knowledge to guide to higher productivity, which can lead to the survival of the business.

Collection, Analysis, and Preparation of Results

In this qualitative research, I used the expressed words to help the reader understand the concepts, thoughts, or experiences of the leaders of SMBs nonprofit organizations in identifying funding sources and marketing strategies to sustain their businesses more than 5 years. The use of qualitative research enabled me to gather in-depth insights on topics that were not well understood. After data collection and analysis of the data, included in this results section are the main findings of my research based upon the information gathered through methodological triangulation from semistructured interviews; documents pertaining to performance outcome data, information provided by the client leader, and the organization's website such as data and information related to finances, budget, and market share. According to Tariq and Butt (2016), the research findings must link with the analysis conducted in the study. The main conclusions presented include product and process results, customer results, workforce results, leadership and governance results, and financial and market results which, relate briefly to the main research question.

Product and Process Results

The client organization documents reviewed showed the project organization’s 2018 interns' product and process results from in-store and online purchases from consumers. The most apparent trend indicated that online sales stemmed from 154 catering jobs, which gave an inclination of a 105% increase in catering sales from the year 2017. The cost of the goods sold trended to a low 17% of total revenue, in which the industry standard is 30%. In the year 2018, a new co-owner was appointed to staff to help manage the sale of products and processes. There were 3651 expresso bar drinks or coffee drinks sold and 1,400 wraps made and other products. In 2018 The project organization interns processed 2840 transactions. The interns had the opportunity to use their customer service and social skill-building training, which also allowed the opportunity for the youths to change the perception that many adults had of the city youths. Because of pressing issues, like social problems, and extreme poverty, which is on the rise in many countries, the transition to a more sustainable socio-economic system seems increasingly desirable (Geissdoerfer, Vladimirova, Fossen, & Evans, 2018). The economic and social aspects of marketing can have an impact on personal economic and social well-being; marketing can affect not only individual consumers but also society as a whole.

Customer Results

Customer satisfaction is the key to organizational success. High quality leads to high levels of customer retention, increase loyalty, and favorable word of mouth, which in turn increases profitability (Lee et al., 2016). Customer needs, preferences, and buying behavior differ, and it can be advantageous for leaders of organizations to manage suitably. Consumers are concerned with the quality of the product and the reputation of the company. Consumers want to know if the company products have positive reviews. Websites, social media, and online marketplaces are some examples of how businesses leverage marketing approaches to connect with customers. It can be advantageous for leaders of SMBs to use advertising on their website to pledge to their customers their dedication. For example, the leaders of the coffeehouse pledge to its customers to provide quality food, beverage, and catering choices with exceptional service. The client organization uses social media such as Facebook, Instagram, Twitter, Snapchat, and Nextdoor as marketing approaches to advertise company events, engage in daily conversations, post pictures of products, and youths, especially when graduating. The customer experience on social media is visible to the entire networked world. Customers choose restaurants based on positive reviews. Conversely, negative reviews can damage the reputation of a company and is terrible for business.

The website information reviewed showed the customer service reviews of the client organization in the year 2019. Customers rated the client organization on either its service, food, drinks, parking, or other. The website information showed that out of 21 customer ratings, 38% or eight customers responded with a rating of 5 stars, which is the highest level of score. Then 33% or seven customers gave a rating of 4 stars followed. Afterward, the ratings leveled off to 14% or three who responded with a score of 3 stars, 5% or one customer gave a score of 2 stars, and 10% or two customers responded with a score of 1 star. Overall, these particular customer reviews showed an average rating of 5 stars made up 38% of the products and services and an average rating of 4 stars made up 33% of the products and services; this means that 71% of all purchases and services averaged a score of 4 stars and above.

Business leaders that modify their marketing strategies to meet the needs of their customers will have a competitive advantage over firms that continue to utilize traditional marketing methods only (Bolos et al., 2016). According to Bolos et al. (2016), a business leader's marketing strategy effectiveness is measured by how much it can engage a consumer's decision to purchase the company's products and services. For example, if the goal is to quantify the e-marketing result, businesses must set specific, measurable goals that align with business objectives.

Workforce Results

The strategic management team of the client organization manages the project organization's youth workforce development program. The leaders of the project organization define its model and stand by its mission and value to develop youths. However, the challenge is to find funders who believe in the model and its worth. According to Sapp (2018), a workforce management system, or all the activities needed to maintain a productive workforce can maximize performance levels and competency for an organization. The project organization's experience includes a program timeline of events to develop the youths; the leaders of the client organization and the project organization expect the youths to progress in 12 months. The youths are involved in on-the-job reality training, life and leadership classes, lead community engagement projects, and get wraparound case management services. The client organization documents reviewed showed an outline of this 12-month program timeline:

- Month 1: Orientation, essential job skills
- Month 2: Monthly enrichment classes and community projects begin
- Months 3-4: Healthy decisions and relationships, financial literacy
- Months 4-5: Skills intensive
- Month 6: National certification exams
- Month 7: Promotion, raise, new duties
- Months 8-9: Goal setting, planning
- Months 10-11: Next steps skills, like resume writing, interviewing, free application of federal student aid (FAFSA)
- Month 12: Graduation and placement

Leadership and Governance Results

The concept of leadership and governance are associated with strategic direction and planning. Leadership and management are crucial for the success of achieving results (Joseph, David, & Kikelomo, 2016). The organization documents reviewed showed the city’s workforce development programs piloted by leaders of the project organization and governed by leaders of the client organization. There were 10 total youth participants for the year 2018. The youths had the opportunity to participate in various programs for learning and development. The leaders' plan for the youths included housing insecure, looking for accommodation, court involvement, using supplement nutrition assistance program (SNAP), have children, no high school diploma, no id, and anxiety or depression. The most significant number of youths participated in the SNAP program, and then looking for housing followed, and then remained level for the other programs. Some tools and services identified for the youth services specialist included resume writing, job placement; legal assistance; housing assistance; and financial advising. Piloting Federal government programs for SMBs to foster the development of leadership skills in employees can be a useful identification for funding source and marketing strategy. These governmental programs can affect not only individual employees economically but also society as a whole.

Financial and Market Results

The leaders of the client organizations expect to maximize not only their financial performance but also social performance. Innovation strategy affects financial, social, and environmental performance. The emphasis lies on the specific problem of analyzing the impact of the innovation strategy on financial, social, and environmental performance (Ezzi & Jarboui, 2016). For example, the website information reviewed showed 2018 statistics of the project organization's income. Out of 4 funders, the income totaled about $170,450. The most substantial portion of funding was from one donor for $125,000, the second-largest donor-supported $35,000; the third funder supported $10,000, and the last donor-supported $450.

The funds were used to help sustain the program, staff salary, and other operational costs. One of the donors' funding was used as payment to supplement the intern or apprentice for a time they put in to learn the trade, as opposed to the work they do. Mainly, the results showed that the most considerable portion of spent funds in 2018 was personnel costs at $22,611, then the program costs $18,872, such as recruitment, training equipment, and community events. Next, trending was fiscal administration costs $16,045, which represented managing incoming and outgoing monetary transactions on and budgets for governments, educational institutions, and nonprofit organizations. Youth stipends costs showed $14,886, and operations cost $2703.17, which represented rent and utilities. The majority of the funding received in 2018 was part of a grant lifecycle of about $95,963, which carried over to 2019. The leaders of the client organization sought grants in the years 2019 and 2020.

Key Themes

The researcher's principal theme, the main product of data analysis, provides practical results in the subject area; uses a descriptor or an implicit topic that organizes a group of repeating ideas; it enables researchers to answer the study question (Vaismoradi, Mojtaba, Jones, Turune, & Snelgrove, 2016). According to Vaismoradi et al. (2016), a researcher's themes can come from reviewing the literature, characteristics of the phenomenon studied, already-agreed-upon professional definitions, from common-sense political constructs, and researchers' values, theoretical orientation, and personal experience with the phenomenon under study. I used a software program to help with coding and thematic analysis for this qualitative single-case study. I used the codes and themes as concepts and constructs because of the correlation with literature and conceptual framework. In this example (Figure 2), I created a bar graph showing an explanation of auto code themes results.

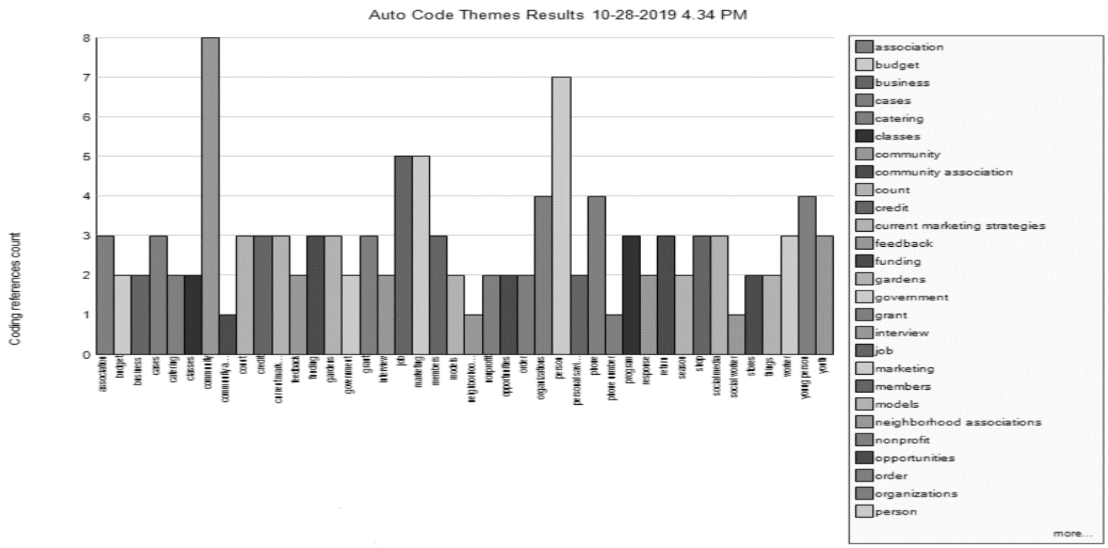

Figure 2. *Auto Code Themes Results*. From Bryant, L. (2019). Unpublished manuscript.

This bar graph shows a description of auto code themes from using a software program. The coding reference count results show the highest number of data references referred to the community. Next, trending was a person (youth), then job and marketing followed. Also, the bar graph shows the organization, phone, and young people trending at the same level. Other auto code themes include count, credit, current marketing strategies, funding, gardens, members, opportunities, order, and personal savings account. Overall, the bar graph shows the majority coding reference count referred to three main themes: community, job, and marketing, which includes person or youth involved. Bryant’s (2019) identification of key themes from using a software program is descriptive in Table 4.

Table 4

Bryant, L. (2019). Identification of key themes from the software program

Themes	Illustrative key findings
Community	-Community involvement
Person	-People or youths who are disadvantaged
Job and marketing	-A job, employment or work occupation -Marketing strategies
The organization, phone, and young person	-The organization is a framework for making marketing and funding decisions -Phone or mobile device used as a marketing strategy -Young Person or youths targeted
Count, credit, current marketing strategies, funding, gardens, members, opportunities, order, and personal savings account	-Count or total number of participants in the project organization's program -Current marketing strategies -Funding strategies -Local Gardens community involvement -Members or individuals belonging to the organization or community -Opportunities or circumstances that make it possible to do something

	-Order or products for purchase by consumers -Personal savings account used as a funding source

Process strengths. A leader's business process and its definition standardize how to do work processes. A process is a series of related events. A documented business process from leadership assures that everyone involved has the same guidelines for how to perform work (Girard, 2017). A leader’s standard business process involves setting the standard, describing the standard, accountability to the standard, and encouraging the continuous improvement of the standard (Clark, 2017). The leaders' standardization of business processes allows for increased efficiency. Leaders focus on the core of the business. For example, the leaders’ requirements of the project organization youths' 12-month development program is a processing strength. The youths engage in the workforce management system by developing on-the-job reality training, life skills, leadership skills, the ability to lead community engagement projects, and skills to cope with emotional and behavioral problems. This process strength or 12-month development program maintains a productive workforce and increase the performance levels and capabilities of the organization. The 12-month development program is an illustration of process strengths; an organization can use this plan when presenting proposals to potential funders to bring about a favorable outcome.

Process opportunities. Process management is the leaders’ formalization of business practices. Leaders' administrative activities aim to define a process, establish responsibilities, evaluate process performance, and identify opportunities for improvement (Clark, 2017). A continuous process by leaders that include the re-evaluation of an organization’s competitors, goals, programs, and strategies can open the door to opportunities for process improvements to sustain or gain competitive advantage. As beforementioned, TQM is an excellent approach to quality in a business that seeks to improve quality and performance, which will meet or exceed consumer expectations. A key component of TQM is the principle of continuous improvement (Martin, 2019). According to Shrestha (2015), leaders of organizations can attribute different types of knowledge, skills, experience, and business networks as critical aspects to fit with opportunities. The outcome of strategy implementation as a result of the leader’s various attributes can lead to losing reductions, enhanced company training culture, increased transparency, and variability reduction (Shrestha, 2015). For example, the client organization catering services, a business process opportunity, in which service and products are for sale to customers. Leadership mapping of the catering services process involves identifying and writing down the physical and information flows. The leaders' process mapping will illustrate the flows graphically in the process from start to finish, which will include activities, personnel, and the outcomes. According to Martin (2019), an advantage the leaders’ process map gives to providing continuous improvement is it defines the scope of the process, the interface with other methods, and a starting point for measurements of development.

Results strengths. One aspect of success requires leaders of an organization and its stakeholders to maintain positive outlooks (Zarestky & Cole, 2017). The client leader's information I reviewed on the website explained why the work processes of the project organization's model work in Table 5.

Table 5

Work Processes: Why Our Model Works

• Young people thrive in long-term programs with experiential learning and wraparound services. Temporary programs without additional support provide no benefit to youth.
• Adults form a support structure that is consistent, compassionate, and challenging. It is a network that pushes youth forward but also catches them when they stumble.
• Earned income stabilizes youth life circumstances and reduces the need for illegal income.
• National certification gives youth industry-recognized qualifications that connect them to continued and higher-level employment.
• Youth develop leadership and ownership by guiding curriculum, planning community projects, and developing management-level skills.

Table 5 includes the client leader's information of the project organization's model and why it works. Five reasons why the model works include (a) the development of young people in long-term learning programs, (b) provides a support structure for adults, (c) gives youths earned income which can help reduce crime in society, (d) offers the opportunity for youths to earn a national certification that connects to higher-level jobs, and (e) learn management-level skills.

Results opportunities. Leaders' results opportunities include a set of circumstances that make it possible to do something. Opportunities analyses from leaders lead as an overview of the state of affairs for their business; however, it's particularly useful for a leader's planning purposes when it's focused on a specific aspect of the business's operations or as help for making decisions (Ward, 2019). The leader of the client organization provided information regarding results opportunities in Table 6.

Table 6

The Leader of the Client Organization's Results Opportunities

• In October 2019, the client organization transitioned to a new location in the mid-Atlantic region of the United States. With a successful Main Streets program in place and a retail corridor, the neighborhood may provide the pedestrian traffic the company has lacked.
• The new location provides the leaders of the company with an opportunity to test a new market, serve more youth, and test their model's replicability with minimal risk; The property owners of the new location has offered reduced rent and provision of all building upgrades.
• The efforts of the marketing committee in 2018, allowed the update of in house and promotional marketing for a cohesive look and message at the new location; The leaders of the local print and brand company offered vibrant marketing to convey the story of the client and project organizations while helping attract new and retaining existing customers.

Table 6 includes descriptions of the leaders of the client organization's results opportunities. Three categories of opportunities include (a) increasing the amount of walk-in traffic to the client organization's new location; (b) take advantage of reduced expenses at the new site, as well as test a new market, serve more youth, test the leaders of the company model replicability with minimal risk; and (c) increase the use of promotional marketing to attract new and retain existing customers. Also, I have included the following marketing strategies can boost funding sources for the client organization: (a) increase social media marketing for catering services, (b) provide a green marketing strategy, (c) increase branding strategy, and (d) enhance the customer experience. See Appendix F for a detailed description I provided using various researchers' concepts and knowledge of how the client organization can boost funding sources using a good marketing strategy.

Project Summary

The purpose of this qualitative single-case study was to explore how leaders of SMBs develop funding sources and marketing strategies to sustain their businesses more than 5 years. The target population for this study comprised three leaders from a nonprofit SMB organization located in the mid-Atlantic region of the United States. The implications for positive social change include social and economic inclusion, health and well-being, and civic engagement through creating and maintaining jobs to provide income to people to improve quality of life and reduce unemployment.

The composition of my literature review included topics that contributed to understanding the research question: What funding sources and marketing strategies can leaders of nonprofit SMBs use to sustain their businesses more than 5 years? There was a need to define sustainable conceptual business models that might help leaders of SMBs position appropriate business strategy to achieve long-term success. The main conceptual growth models discussed were GGM (Waterhouse, 2017), Jablonski and Jablonski’s (2016), and Mella and Pellicelli’s (2015) growth models. The business growth models presented referred to VBM, which can be helpful in change management when examining problems in business. The chosen conceptual framework (models) strengthened my study by connecting existing knowledge to help leaders of SMBs identify which phase(s) an issue(s) of the business model throughout its life cycle can guide towards improved performance in the way of how the business creates, delivers, and captures value. I selected the conceptual growth models on its potential for facilitating an understanding of my study’s findings. The business growth models I chose reflected various researchers’ facts, information, and skills acquired through experience or education, and practical knowledge of the subject. The conceptual framework demonstrated an understanding of concepts that are relevant to the topic of the research paper and related to the broader areas of knowledge considered. Other main issues I explored in this literature review included marketing strategies, customer relationship management, social media marketing, branding strategy, catering to the needs of in-store and online customers, diversification, customer experience, sustainability or green marketing strategy, and funding sources. The conceptual framework and other leading topics consisted of concepts, and together with their definitions and reference to scholarly literature, were used to support this study.

I used the purposive sampling technique to choose the research population for the proper use of available resources. I collected data through methodological triangulation from semistructured interviews, documents pertaining to performance outcome data, information provided by the client leader, and the organization’s website data and information related to finances, budget, and market share. I used a software program to help with coding and thematic analysis. Thematic analysis was used to analyze the data. Three main themes emerged: community, job, and marketing; I ensured no disclosure of proprietary sensitive or confidential information in the doctoral study. I received approval from Walden’s IRB before the collection of any data, such as participants and archival data. I was permitted to collect only interview and archival data, as per terms of the agreed documents, *consent form*, *service order*, and *IRB* requirements.

Results strengths of the client organization refer to the project organization's business model, *Why Our Model Works*. Five reasons why the model works include (a) the development of young people in long-term learning programs, (b) provides a support structure for adults, (c) gives youths earned income which can help reduce crime in society, (d) offers the opportunity for youths to earn a national certification that connects to higher-level jobs, and (e) learn management-level skills. Results opportunities of the client organization refer to various categories of possibilities which include (a) increasing the amount of walk-in traffic to the client organization's new location; (b) take advantage of reduced expenses at the new site, as well as test a new market, serve more youth, test the leaders of the company model replicability with minimal risk; and (c) increase the use of promotional marketing to attract new and retain existing customers. Also, I have included the following marketing strategies can boost funding sources for the client organization: (a) increase social media marketing for catering services, (b) provide a green marketing strategy, (c) increase branding strategy, and (d) enhance the customer experience.

Contributions and Recommendations

Applications to Professional Practice

Professional practice refers to the use of one's knowledge and experience in a profession (Definitions.net STANDS4 LLC., 2020). The optimum goal of data is its relation to professional practice, the effective implementation of skills, and strategies that enhance knowledge and transfer of learning. SMB nonprofit leaders face challenges to make a profit, be sustainable, and deliver financial gain to stakeholders. They have to prove to those whom they report the correctness of decision-making processes as it relates to their performance and efficiency (Pilkova & Mikus, 2016).

The main reason for research is to inform action, to prove a theory, and contribute to developing knowledge in a field of study (Zarah, 2020). The purpose of this qualitative single-case study was to explore how SMB nonprofit leaders develop funding sources and marketing strategies to sustain their businesses more than 5 years; to make an original contribution to the field by creating practical solutions to a real problem. The identification of fruitful funding sources and marketing strategies can benefit SMB nonprofit leaders strategic planning and enable increased business performance through maintaining and growing relevant stakeholder groups’ support through VBM or shareholder wealth maximization. By this means rising SMB leaders survival rates.

The results of my research may add to the growing body of research in government-funded projects. SMB nonprofit leaders may plan by communicating research findings of the positive impact and outcomes of the identified funding sources and marketing strategies to the organization's writer of grants or in this study the program advancement officer, who is an integral part of the client's nonprofit organization. The program advancement officer oversees program development, seek grants and proposals; and ensures that the organization's activities and programs align with the goals and mission statements of that nonprofit. The program advancement officer can use the impact of positive funding sources and marketing strategies results as leverage in the presentation of grant proposals to existing and potential funders.

Implications for Social Change

Suggestions for social change refer to the potential for a researcher's study to impact society in visible or useful ways, teach us to look at the world in a systematic fashion that relies on evidence and supported conclusions (Allen, 2017). Positive social change (PSC) implies a transformation that results in positive outcomes**.** In this study, I refer to PSC as proactively initiated through the activities of market-based organizations, that is, organizations that leverage market-based mechanisms to create value by operating in a competitive environment and producing or distributing products or services (Stephan, Patterson, Kelly, & Mair, 2016). According to the National Council of Nonprofits (2020), nonprofit leaders depend upon quality research to increase their understanding, improve their operations and programs, and advance their public policy and public awareness initiatives.

The inferences for PSC include increased awareness and understanding, to attitudinal change, to SMB nonprofit leaders toward identified funding sources and marketing strategies have on the TBL, the social, environmental, and financial components of business for long term survival in various conditions. According to Jablonski and Jablonski (2016), at periods of severe disorder in one or various phases of the business growth lifecycle, one can implement appropriate strategies for sustainability, which concerns the TBL. For example, by an increased understanding of SMB leaders of what funding sources and marketing strategies are available to sustain their businesses more than 5 years, might support leaders' job creation in the local communities and reduce unemployment.

Recommendations for Action

Recommendations urge specific actions to be taken about policy, practice, theory, or subsequent research. They are suggestions that a researcher makes concerning further research on the topic (The Association for Qualitative Research, 2020). Recommendations are a necessary part of the analysis phase; this is where a researcher suggests specific interventions or strategies to address the issues and constraints identified in the assessment.

The investigation revealed when writing a grant proposal, to enhance the proposition of the project proposal to potential funders, positioning the positive results of the impact and outcomes of identified funding sources and marketing strategies would add value to the proposal to obtain funds from grantors for the sustainability of the business. To be awarded a grant, the grant writer submits a proposal to be eligible for receiving funding. The grant writer's proposal typically will request funding to support activities and programs that are consistent with the leader of a nonprofit organization's mission (Youngson, 2017). According to Parry et al. (2018), a lack of clear guidance for funders, evaluators, and improvers on what to include in evaluation proposals can lead to evaluation designs that do not answer the questions stakeholders want to know. For this reason, I recommend to researchers more methodological work on how to capture the impact and outcomes of funding sources and marketing strategies. In this study, the program advancement officer would focus on the scope of the project (features and functions of the program) that would meet its stakeholders' requirements.

Recommendations for Further Research

Future research defined as a systematic study of possible future events and circumstances, work that needs further research (Dudovsky, 2019). The recommendations for further research section is for research that has not been done but could be performed by others. Opportunities for future research are sought through gaps in the literature on the study's various challenges and problems. The literature review helps to understand the research gaps, opportunities, and the need to undertake new research projects (Paul, Parthasarathy, & Gupta, 2017).

Leaders of nonprofit SMBs spend a significant amount of time on the seeking of financial support but face challenges on how to secure the money they will need to sustain their business for the long term. The leaders of social organizations leverage market-based activities to more effectively alleviate societal challenges, and funders seek to instigate social change while generating economic returns (Stephan, Patterson, Kelly, & Mair, 2016). Funders are in the business of social change, and they want to know that the results the leader of the organization expect are worth the investment of their grant money. Mainly, the funders want to know, is the program cost-effective, given what it will produce? For this reason, I recommend research to develop approaches and carry out a full cost-benefit analysis of SMB nonprofits' leaders' involvement with funders to show evidence of the effectiveness of their support. Conduct some longer-term studies which sought to quantify the impact of funders on such critical indicators as activities, programs, and functional business requirements such as products, systems, software, and processes or in the way of how the business creates, delivers, and captures value.

Reflections

The doctoral research process was challenging and rewarding. All components of the study are essential, (a) the foundation of the study, (b) the project, and (c) the organizational profile. All parts helped lead to the identity of PSC. The doctoral study was challenging to work alone and learn the research independently. The challenges required personal sacrifices and perseverance to stay on track. For example, when faced with delayed support from a participant, it was necessary to be patient and draw on the knowledge of others who were qualified to share real-life experiences concerning the phenomenon under study. About the reward, the excitement of exploration of how SMB nonprofit leaders develop funding sources and marketing strategies to sustain their businesses more than 5 years was an exhilarating process. The process led to the answer to the research question and, ultimately, the opportunity to make an original contribution to the field by creating practical solutions to a real problem.

The experience I gained throughout this process was a synthesis of new thinking and writing around the concept of professional practice, which included a comprehensive review of existing literature, themes, and ideas extracted from multiple primary and secondary sources. Primary and secondary sources included semistructured interviews, documents pertaining to performance outcome data, information provided by the client leaders, and the organization's website data and information related to finances, budget, and market share. The original doctoral study data collected creates a better position for many additional studies stemmed by my recommendations for further research.

Conclusion

The objective of my research is to advance knowledge of potential funding sources and marketing strategies for SMB nonprofit leaders to use to sustain their businesses more than 5 years. The identification of fruitful funding sources and marketing strategies can benefit SMB nonprofit leaders strategic planning and enable increased business performance through maintaining and growing relevant stakeholder groups' support through VBM or shareholder wealth maximization. By this means rising SMB leaders' survival rates. Further, my research aimed to contribute to the growing body of research in government-funded projects. SMB nonprofit leaders may plan by communicating research findings of the positive impact and outcomes of the identified funding sources and marketing strategies to the organization’s writer of grants.

There are gaps or an opportunity to expand research on the topic of knowledge about funding sources and marketing strategies for SMB leaders in nonprofit organizations. I recommend for future research to include (a) more methodological work on how to capture the impact and outcomes of funding sources and marketing strategies, and (b) research to develop approaches and carry out a full cost-benefit analysis of SMB nonprofit leaders involvement with funders. After awarding a grant, funding organizations want to see the results of their investments. Conducting long-term studies that allow the researcher to quantify the impact of nonprofit leaders’ involvement with funders would be useful.

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Appendix A: Sustainable Business Models

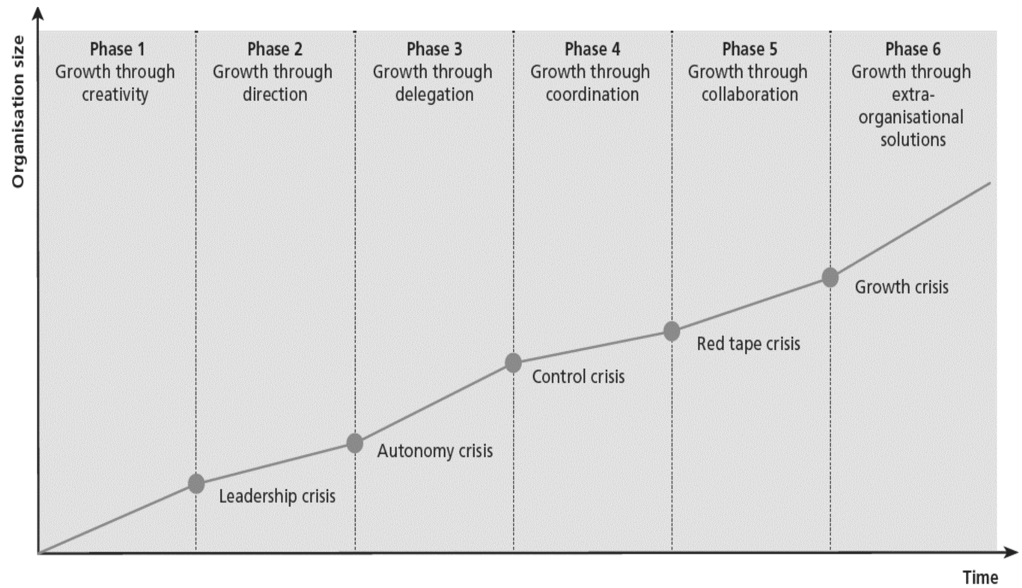

Figure 3: The Six Phases of Organizational Growth According to Greiner's Model. Source: Representation of Greiner's growth model (1972), Waterhouse, P. (2017). EasyJet and Greiner's growth model. *Business Review, 24*, 8-10. Retrieved from Retrieved from https//www.hoddereducation.co.uk/businessreview

Greiner, through his research, identified six phases and five predicted crises a business may go through as they mature. The six phases of growth include (a) creativity, (b) direction, (c) delegation, (d) coordination, (e) collaboration, and (f) alliances. The five predicted crises include (1) *crisis of leadership*, (2) *crisis of autonomy*, (3) *crisis of control*, (4) *crisis of red tape*, and (5) *crisis of growth*.

BUSINESS SUSTAINABILITY TYPOLOGY	Concerns (What)?	Value Created (What for)?	Organizational perspective (How)?
Business-as-usual	Economic concern	Shareholder value	Inside-out
Business Sustainability 1.0: Refined Shareholder Value	Three-dimensional concerns	Shareholder value	Inside-out
Business Sustainability 2.0: Triple Bottom Line	Three-dimensional concerns	Triple bottom line	Inside-out
Business Sustainability 3.0: True Business Sustainability	Starting with sustainability challenges	Creating value for the common good	Outside-in
The key shifts involved	1st shift: broadening the business concern	2nd shift: expanding the value created	3rd shift: changing the perspective

Figure 4. Business Sustainability: Typology with key characteristics and changes. Source: Jablonski, A., & Jablonski, M. (2016). Research on business models in their life cycle. *Sustainability, 8*, 1-35. doi:10.3390/su8050430

The business model of mature companies is based on assumptions ensuring the long term viability of the business. When the company moves from the stage of early development to the maturity stage, business models change in such a way that the assumptions of the TBL concept become increasingly important. The TBL is composed of three parts: social, environmental, and financial, which are expressed in the joint implementation of corporate social sustainability and VBM assumptions. The key concept underlying the concept of sustainability is related to the fundamental nature of knowledge concerning the TBL, which increases the chances of survival in various conditions.

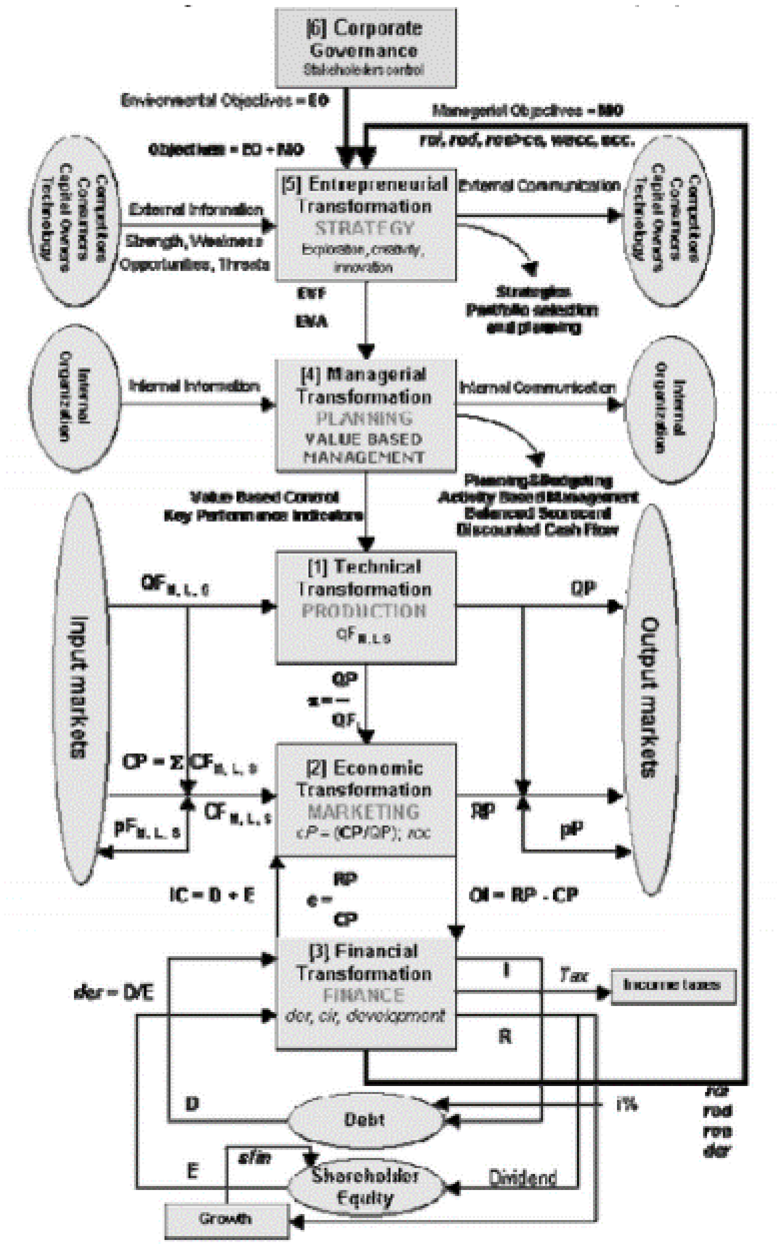

Figure 5. The Firm as a Cognitive System for Efficient Transformation.
Source: Mella, P., & Pellicelli, M. (2015). The origin of value-based management: Five interpretative models of an unavoidable evolution. *The International Journal of Knowledge, Culture and Change Management*, *8,* 1-16. doi:10.18848/1447-9524/cgp/v08i02/50507

Mella and Pellicelli (2015) identified factors external and internal to growing businesses that make it unavoidable to change the traditional managerial perspective from profit maximation in favor of a new approach that views the production of shareholder value. The researchers emphasized that as companies expand in size and complexity, and as the formation of diversified business, portfolios become more frequent, it becomes natural and unavoidable to introduce VBM as a conventional management approach. To account for this assumption five sources of explanation have been considered: (1) stimulus of economies of growth, (2) the genesis of managerial business and the separation of ownership and control, (3) Flamholtz growth model (as cited in Mella & Pellicelli, 2015), (4) GGM (as cited in Waterhouse, 2017), and (5) Mella and Pellicelli's (2015) growth model.

Appendix B: DBA Research Agreement

Note to doctoral students selected for the consulting capstone option: The University has entered into the following agreement with each site that agrees to host consulting capstone students. As a representative of Walden University, it is important that you review and comply with the terms of this agreement. **IMPORTANT: You are <u>not</u> to obtain signatures for this document. Walden University has already obtained the appropriate signatures for approved consulting sites.**

THIS AGREEMENT (the "Agreement") is made and entered into on this XXX date (the "Effective Date") by and between WALDEN UNIVERSITY, LLC, located at 100 Washington Avenue South, Suite 900, Minneapolis, MN 55401 ("Walden") and [RESEARCH PARTNER NAME] located at [ADDRESS] ("Institution").

<u>RECITALS</u>

WHEREAS, Walden offers undergraduate and graduate degree programs and seeks to partner with institutions to allow Walden doctoral students (the "Students") to receive academic credit for work on research projects ("Research").

NOW, THEREFORE, in consideration of the mutual promises and covenants hereinafter set forth it is understood and agreed upon by the parties hereto, as follows:

I. <u>TERM AND TERMINATION</u>

This Agreement shall commence on the Effective Date and shall continue for a period of three (3) years (the "Initial Term"). Upon expiration of the Initial Term of this Agreement, this Agreement and the Term shall renew for successive one (1) year periods (each a "Renewal Term"). Notwithstanding the foregoing, either party may terminate this Agreement for any reason or no reason, upon ninety (90) calendar days' prior written notice to the other party. In the event of termination or expiration of this Agreement before a participating Student(s) has completed the Research, such Student(s) shall be permitted to complete the Research subject to the applicable terms of this Agreement, which shall survive for such Research until the date of completion.

II. <u>RESEARCH</u>

A. Institution and Walden may, from time-to-time, agree that selected Students, if accepted by Institution, may participate in Research with Institution. Walden shall be responsible for referring Students to the Institution and will instruct Students to provide Institution with a description of the Research. Walden agrees to refer to the Institution only those Students who have completed the required prerequisite course of study as determined by Walden. The parties anticipate that all Research will be done remotely and that Students will not be present at Institution's facilities.

B. Walden and Institution will conduct their activities hereunder in compliance with their respective policies and all applicable laws and regulations. In the event that any regulatory compliance issues arise, the parties will cooperate in good faith in any review conducted by the other party.

C. Where applicable, the Institution shall provide the Student with an orientation familiarizing student with all applicable State and Federal laws and regulations that pertain to the Research with the Institution, which may include those pertaining to Standards for Privacy of Individually Identifiable Health Information (the "Privacy Rule") issued under the federal Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), which govern the use and/or disclosure of individually identifiable health information.

D. The Institution reserves the right to dismiss at any time any Student whose health condition, conduct or performance is a detriment to the Student's ability to successfully complete the Research at the Institution or jeopardizes the health, safety or well-being of any patients, clients or employees of the Institution. The Institution shall promptly notify Walden of any problem or difficulty arising with a Student and a discussion shall be held either by telephone or in person to determine the appropriate course of action. The Institution will, however, have final responsibility and authority to dismiss any Student from Institution.

E. The Institution and Walden shall each maintain general liability insurance (or comparable coverage under a program of self-insurance) for itself and its employees with a single limit of no less than One Million Dollars ($1,000,000) per occurrence and Three Million Dollars ($3,000,000) annual aggregate. Each party shall provide the other party with proof of coverage upon request.

III. <u>STUDENT RESPONSIBILITIES</u>

A. The Student shall agree to abide by the rules, regulations, policies and procedures of the Institution as provided to Student by the Institution during their orientation at the Institution and shall abide by the requirements of all applicable laws.

B. If applicable, the Student shall agree to comply with the Standards for Privacy of Individually Identifiable Health Information (the "Privacy Rule") issued under the federal Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), which govern the use and/or disclosure of individually identifiable health information.

C. The Student shall arrange for and provide to Institution any information requested by Institution including, but not limited to, criminal background checks, health information, verification of certification and/or licensure, insurance information and information relating to participation in federally funded insurance programs.

IV. MUTUAL RESPONSIBILITIES

A. FERPA. For purposes of this Agreement, pursuant to the Family Educational Rights and Privacy Act of 1974 ("FERPA"), the parties acknowledge and agree that the Institution has an educational interest in the educational records of the Student participating in the Program and to the extent that access to Student's records are required by the Institution in order to carry out the Research. Institution and Walden shall only disclose such educational records in compliance with FERPA.

B. HIPAA. The parties agree that, if the Institution is a covered entity under HIPAA:

(1) Where a Student is participating in Research that will require access to Protected Health Information:

(a) Student shall be considered part of Institution's workforce for HIPAA compliance purposes in accordance with 45 CFR §160.103, but shall not otherwise be construed to be employees of Institution;

(b) Student shall receive training by the Institution on, and subject to compliance with, all of Institution's privacy policies adopted pursuant to HIPAA; and

(c) Student shall not disclose any Protected Health Information, as that term is defined by 45 CFR §164.105, to which a Student has access through program participation that has not first been de-identified as provided in 45 CFR §164.514(a);

(2) Walden will never access or request to access any Protected Health Information held or collected by or on behalf of the Institution that has not first been de-identified as provided in 45 CFR §164.514(a); and

(3) No services are being provided to the Institution by Walden pursuant to this Agreement and therefore this Agreement does not create a "business associate" relationship as that term is defined in 45 CFR §160.103.

C. Publications. Students and Walden are free to publish, present, or use any results arising out of the Research for their own academic, instructional, research, or publication purposes. Students shall submit a draft of any proposed publication to Institution at least ten (10) business days prior to submission for publication, presentation, or use. To the extent Institution requires that Students enter into nondisclosure or confidentiality agreements, such agreements shall be subject to this Section allowing publication of Research results.

D. Institution and Walden will promote a coordinated effort by evaluating the Research at mutually agreeable times, planning for its continuous improvement, making such changes as are deemed advisable and discussing problems as they arise concerning this affiliation.

E. The parties agree that Students are at all times acting as independent contractors and that Students are not and will not be considered employees of the Institution or any of its subsidiaries or affiliates by virtue of a Student's participation in the Research and shall not as a result of Student's participation in the Research, be entitled to compensation, remuneration or benefits of any kind.

F. Institution and Walden agree that Student will have equal access to their respective programs and facilities without regard for gender identity, race, color, sex, age, religion or creed, marital status, disability, national or ethnic origin, socioeconomic status, veteran status, sexual orientation or other legally protected status. Institution and Walden will comply with all applicable non-discrimination laws in providing services hereunder.

G. The terms and conditions of this Agreement may only be amended by written instrument executed by both parties.

H. This Agreement is nonexclusive. The Institution and Walden reserve the right to enter into similar agreements with other institutions.

I. This Agreement shall be governed by the laws of the State of Minnesota.

J. Any notice required hereunder shall be sent by certified or registered mail, return receipt requested and shall be deemed given upon deposit thereof in the U.S. mail (postage prepaid). Notices to Walden shall be sent to Jenny Sherer, Office of Research Ethics and Compliance; 100 Washington Avenue South, Suite 900; Minneapolis MN 55401 with a copy to: Walden University, LLC; Attention: Assistant Divisional Counsel; 650 South Exeter Street; Baltimore, MD 21202.

K. Each party agrees to indemnify, defend, and hold harmless the other from all losses or liabilities resulting from the negligent acts or omissions of the indemnifying party and/or its employees or agents arising out of the performance or the terms and conditions of this Agreement, except to the extent such losses or liabilities are caused by the indemnified party's negligence or willful misconduct.

L. This Agreement sets forth the entire understanding of the parties hereto and supersedes any and all prior agreements, arrangements and understandings, oral or written, of any nature whatsoever, between the parties with respect to the subject matter hereof. This Agreement and any amendments hereto may be executed in counterparts and all such counterparts taken together shall be deemed to constitute one and the same instrument. The parties agree that delivery of an executed counterpart signature hereof by facsimile transmission, or in "portable document format" (".pdf") form, or by any other electronic means intended to preserve the original graphic and pictorial appearance of a document, will have the same effect as physical delivery of the paper document bearing the original signature.

SIGNATURE PAGE FOLLOWS

IN WITNESS WHEREOF, the parties hereto have duly executed this Agreement, effective the date first above written:

WALDEN UNIVERSITY, LLC	INSTITUTION
By: ____________________________	By: ____________________________
(signature)	(signature)
Name: __________________________	Name: __________________________
(Print name)	(Print name)
Title: ___________________________	Title: ___________________________
Date: ___________________________	Date: ______________________

Appendix C: Service Order Agreements

Project Proposal

This Project Proposal has been drafted by [STUDENT NAME] for [COMPANY NAME] and is dated [DATE].

Scope of Work

- [describe internship expectations and outcomes/deliverables]

Work Phase	Estimated Time Required
Online interactions:	
Outcomes/Deliverables:	
Additional Services Provided if Requested:	
Total	

Services Summary	Length of Engagement

Terms of confidentiality and compliance:

In all reports (including drafts shared with peers and faculty members), the student is required to maintain confidentiality by removing names and key pieces of information that might disclose an Institution's/individual's identity or inappropriately divulge proprietary details. If the Institution itself wishes to publicize the findings of this project, that is the Institution's judgment call.

The student will publish the case study in ProQuest as a doctoral capstone (with site and participant identifiers withheld). The case study will be based upon interviews with non-vulnerable adults on the topic of the Institution's business operations, review of public records, and review of internal records/documents related to the Institution's operations that the Institution deems appropriate for sharing with the student. The doctoral student will not use these data for any purpose other than the project outlined in this agreement.

Interview recordings and full transcripts will be shared with any interviewee (upon request), and the doctoral student will provide opportunities for clarifying previous statements. Transcripts with identifiers redacted may be shared with the doctoral student's university faculty, peer advisors, and site leadership (upon request).

The doctoral student is responsible for understanding and complying with all of the Institution's policies and regulatory requirements.

Ethical Conduct in this Consulting Relationship

The Code of Conduct in the Walden University Student Handbook and the ethical requirements for IRB compliance described in the Manual for the DBA Consulting Capstone bind DBA students in the consulting capstone.

Also, DBA students are required to uphold professional principles in fulfilling their roles as consultants and coaches to client organizations. Beyond the confidentiality requirements outlined above, three principles are key to ensuring ethical conduct in consulting relationships.

<u>Principle 1: Protect the integrity of Walden University</u>

- Not representing conflicting or competing interests or positioning themselves such that their interest may be in conflict or may be perceived to be in conflict with the purposes and values of Walden University
- Not intentionally communicating false or misleading information that may compromise the integrity of Walden University and of the consulting capstone experience

<u>Principle 2: Exhibit professional conduct at all times</u>

- Respecting the climate, culture, values, and regulatory requirements of client organizations and client workforce members

<u>Principle 3: Protect the promise of confidentiality</u>

- Not using or adapting client organization's data and information after the capstone experience, unless the information has been publicly shared by the client
- Not conducting telephone conferences with the client organization in public places where information may be overheard

This Project Proposal has been approved by [NAME]:

____

SIGNATURE

The terms of this Project Proposal have been agreed to by [STUDENT'S NAME]:

____

SIGNATURE

Document date: June 2016

Appendix D: Interview Questions

Interview Questions

1. What key obstacles are you experiencing as a nonprofit organization that prevent you from funding your business?

2. How do you seek to affiliate with the local community for identifying and developing funding sources and marketing strategies to help sustain your business?

3. How, if at all, do you use the Internet or social media for marketing your organization?

4. How do your customers perceive the effectiveness of your current marketing strategies?

5. What funding sources are you currently using to finance your business?

6. What marketing strategies do you consider when looking for new business markets?

7. How do you currently assess the effectiveness of your funding and marketing strategies to support sustainability more than 5 years?

8. What else can you provide about funding sources and marketing strategies to sustain your businesses more than 5 years that we have not discussed?

Appendix E: Interview Protocol

Interview Topics

As you know, Walden University is working directly with your organization in which Doctor of Business Administration (DBA) students serve as business consultants to the leaders of a business or nonprofit organization in your case, both. As a scholar-consultant to your organization, I engage in learning by conducting in-depth research for your company. The objective is to coach participants to improve key work processes, overcome strategic challenges, and increase overall performance. My purpose as your scholar-consultant is to collaborate with you to help bring about positive social change.

Although Walden University has some acquaintance with the responsibilities of your company, in our interview, I would like to get a better sense of the details of the interview questions I forwarded to you.

Interview Questions

1. What key obstacles are you experiencing as a nonprofit organization that prevent you from funding your business? Probes?

2. How do you seek to affiliate with the local community for identifying and developing funding sources and marketing strategies to help sustain your business? Probes?

3. How, if at all, do you use the Internet or social media for marketing your organization? Probes?

4. How do your customers perceive the effectiveness of your current marketing strategies? Probes?

5. What funding sources are you currently using to finance your business? Probes?

6. What marketing strategies do you consider when looking for new business markets? Probes?

7. How do you currently assess the effectiveness of your funding and marketing strategies to support sustainability more than 5 years? Probes?

8. What else can you provide about funding sources and marketing strategies to sustain your businesses more than 5 years that we have not discussed? Probes?

Appendix F: How the Client Organization can Boost Funding Sources Using Marketing Strategies

A. Increase social media marketing using Facebook, Instagram, Twitter, Snapchat, and Nextdoor as marketing approaches to advertise company events, engage in daily conversations, post pictures of products, and youths.

- Define your audience
- Create content in line with expectations of audience of followers
- Share sincere and communication-oriented message content instead of formal language
- Receive feedback regarding shared content for answers regarding the content release
- Introduce new products
- Advertise discounts
- Increase promotion of special events

B. Provide a green marketing strategy, reduce waste, reuse containers, and recycle materials. Include environmentally safe products in your cleaning routine.

- Buy kitchen and coffee equipment made from 100% recycled materials
- Recycle wood boxes, glass bottles, and cardboard
- Exchange plastic and Styrofoam materials for reusable cups and recyclable containers

- Swap out conventional cleaners with eco-friendly brands.
- Swap your regular toilet paper and paper towels with chlorine-free, recycled paper

C. Increase the branding strategy for in-store and online customer experience.

- Customer needs for the in-store environment include to be remembered, value for money, the same quality of food every time, and to feel relaxed and comfortable.

  -serve hot fresh coffee every time including a variety of foods and beverages

  -introduce flavored brews differently, offering customers to try out new flavors each time they visit including a sample of different types of foods and beverages

  -approach every customer relationship with respect, friendship, and caring nature

  -use eco-friendly products in the coffeehouse

  -the environment is clean and lit with natural lighting

  -the coffeehouse provides free Wi-Fi access

- Efficiency and cost matters to the online customer.
  - offer user-friendly or ease-of-purchase on the website for customer orders

- allow the use of a mobile device or cell phones for customers to make a purchase
- offer discounts

D. Enhance the customer experience.

- Impact the atmosphere of coffeehouses with lighting, music, decoration, cleanliness to influence customers to revisit.
    - a smile from a service employee, background music in a service setting, or the offering, such as the product itself, including elements that represent additional value to customers. For example, if need, offer convenient delivery