Referral marketing programs in digital business: A case study on planning, implementation and evaluation in companies inserted in the digital environment

Programas de *referral marketing* em negócios digitais: Um estudo de casos sobre o planejamento, implementação e avaliação em empresas inseridas no meio digital

Amanda Sousa Carvalho Ribeiro
Federal University of Bahia, Brazil
amanda.scr@hotmail.com

Luciana Alves Rodas Vera
Federal University of Bahia, Brazil
lu.alvesvera@gmail.com

ABSTRACT

This article aims to understand how the process of planning, implementing and evaluating a referral marketing program in digital businesses is configured. For this, a multiple case study was carried out with companies α, β and γ, through in-depth interviews with managers. The results of this study contribute to the dissemination of the referral marketing strategy in Brazil, as well as guide the best dissemination practices and better selection of members for the programs.

Keywords: Referral marketing, Referral marketing programs, Digital business.

INTRODUCTION

Programs of marketing referral are marketing programs focused on the incentive of indications of a brand, product or service by part of the already

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existing clients, to their friends, family members or work colleagues, making them also consumers Kumar, Leone & Petersen, 2010). To a referral marketing program to occur, it is necessary a preview of clients who admire a brand, product or service, since the participants of referral programs are just like lawyers or influencers of a brand, of which they are already admires, being encouraged through awards, according to the indications performed.

Brands and companies that adopt such type of marketing strategy aim at satisfied and enchanted customers as a channel of acquisitions to other potential clients. Such movement has occurred, since clients from indication reward programs (programs of referral marketing)) are more loyal and valuable than those acquired by other marketing channels (Schmitt, Skiera & Van Den Bulte, 2011).

There are two ways to reward clients in referral programs. The first is through direct rewards, which means, money reward or prizes, such as gifts or upgrades in plans. The second way does not involve awards and money prizes, but the boosting of visibility of that client in social media, the acknowledgment as authority or even special treatment in interactions with the brand (Lee, 2012).

Referral programs have gained popularity as forms of client acquisition in the last years. Currently, it is common to see digital business applying the strategy to retain and acquire clients. Digital business, for once, as those that, unlike traditional business, which attend majority clients in presential form, are accessed by their clients remotely, from any time or place (Moraes & Campos, 2021).

In face of this, the problem of research from this articles is how to configure the process of planning, implementation and evaluation of a referral marketing program in digital businesses? Therefore, the purpose is to understand how the process of planning, implementation and evaluation of a referral marketing program is configured in digital businesses. To reach such goal, a research of

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qualitative approach was performed, using as method of study multiple cases with the use of interviews with the companies α, β e γ.

A research in the academic research base Google Scholar was performed with the terms "referral marketing", indication marketing" and "indication marketing programs" and studies after the year of 2000 were not found, both in national as well as in international scope. Before such period, although the terms as present in the researches, the most part of the studies are not linked in fact to the object of study, which are the referral marketing programs. Such facts highlight that, even though the market is using the referral programs as marketing strategy, the subject has not been widely studied and researched in depth in the academic environment, which is an indication of the importance of such study.

THEORETICAL REFERENTIAL

Referral marketing

Programs of referral marketing, also known as marketing programs of indication, are a type of marketing strategy for the acquisition and retention of clients (Kumar, Leone & Petersen, 2010). Some concepts may be overlapped, but a referral marketing programs is different from the simple incentive to the word-to-mouth indication, which may occur through salespeople, social media or more complex marketing campaigns. According to Berman (2016), members of a referral marketing program are just like lawyers or influencers of a brand of which they are already admires.

Another point of divergence between referral marketing programs and the simple incentive by word-to-mouth is the fact that the referral programs present a clear advantage, which means, a reward to the indicator. This means, the clients are encouraged to indicate a certain brand or product, through the rewards, which are performed according to the indications performed. The existence of a reward, in addition to encouraging the indication, may guarantee a higher control over the content of the message

which is being broadcast, based on the rules from each program (Berman, 2016).

Referral program rely on follow-up, monitoring and control of the participants and their activities of disclosure, which is very difficult to occur in cases where there is only one incentive to the organic indication (Schmitt, Skiera & Van Den Bulte, 2011). On the other hand when referral marketing programs are compared to other traditional marketing programs, few are the overlapping of concepts, in face of so many differences existing in the issues of proper target-markets, purposes of marketing, marketing organization and general planning and implementation strategies (Berman, 2016). Meanwhile, the traditional marketing programs search for clients who will speak well of the brand, direct the efforts to campaigns for clients who have high value during their useful life and use fidelity programs to ensure the recurrence of the purchase, as for the referral marketing programs are based on looking to the current clients as influencers and defensors of a brand (Berman, 2016).

The referral programs present some advantages in face of traditional marketing programs, such as higher credibility of the recommendations regarding paid adds, access to new clients that other traditional marketing actions may not reach and greater fit of the reached clients to the brand, product or indicated service (Berman, 2016). The organizations that reach a fast growth are those which do not consider the clients only as "buyers of things", but as defensors and influencers (Lee, 2013).

The referral programs present another advantage on the traditional programs: its cost of acquisition of clients. Such strategy is among the easiest and most economic ways to obtain new leads (business opportunities) (Schmitt, Skiera & Van Den Bulte, 2011), as exemplified in the case of Dropbox. The referral marketing strategy has contributed to the organic growth of businesses, since in addition to creating the intention of purchase, it values long-lasting relationships established on trust (Jantsch, 2010). In such type of strategy, a faithful client is seen as a way of acquisition of new faithful clients. Having this

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at sight, adding to the financial advantage of such type of strategy, it is important to highlight that the referral marketing programs are not multi-level marketing programs.

The base idea of referral programs is to use the social connections of the existing clients with non-clients to convert the former. To make such conversion to happen, the company offers the existing client a reward by bringing new clients. The basic differences between the referral marketing strategy and the multi-level marketing are on the fact that in the referral programs, the source of social influence is limited to the clients instead of any person who knows the brand or event, and, unlike multi-level marketing, the clients are rewarded only by bringing new clients. Which means, they do not perform any other function of sales (such as parties or lectures), hence, they do not generate any sales income (Schmitt, Skiera & Van Den Bulte, 2011).

Although the referral programs do not carry the stigma of exploring the social bonds for financial ends, such as the multi-level marketing does (Biggart, 1990), such type of program is prone to abuses by part of the clients. This occurs precisely since in the majority of the indication and recommendation programs, the reward is given regardless of how much time the indicated new clients remain in the company. Even if the company does not sustain in accepting each indication, the fact that an incentive exists, added to the imperfect triage performed by the company, creates a possibility of abuse, in which the existing clients are rewarded by indicated low quality clients (Schmitt, Skiera & Van Den Bulte, 2011). Therefore, it is important that rules are pre-defined and communicated clearly and that the monitoring is constant, to avoid that the participants become rewarded by indicating low quality clients.

Planning, implementation and evaluation of referral marketing programs

According to Berman (2016), a referral marketing program may be planned, implemented and evaluated in eight steps (1) organization of the

program, (2) planning of the budget, (3) identification of a base of clients for the implementation, (4) selection of the promotional media and the content of the message, (5) determination of proper rewards, (6) specification of rules of the program, (7) choice of the software of the program and (8) evaluation of the success or failure of the program.

Organization of the program

Berman (2016) defends that referral marketing programs do not compete only with the marketing areas directly linked to sales or public relation. Effective programs go through several marketing areas in addition to those, such as publicity, sales promotion, social media and relationship marketing. Another point of attention is on the importance of a single referral program and not of different programs between different groups of clients that need to be posteriorly integrated. It is essential that there is also a person supervising and controlling exclusively the program. In case of companies that do not have a professional with expertise on the matter or available workforce, the ideal is to outsource such activity.

Budget planning

The majority of the companies develop their referral programs by only focusing on the person that performs the recommendation, however, some already reward both the indicator as well as the indicated (Ryu & Feick, 2007). The budget of the programs of referral marketing needs to include the costs of recruiting the indicators, rewards of the indicated, in addition to the costs of managing the program, as the person or company responsible for its administration and control softwares (Berman, 2016).

It should be thought, during the budget planning, that the incentive of the indication is a variable cost. This occurs since the value of the incentive may be varied to reflect the profit of a new client. In addition to the value of the incentive, the marketing professionals responsible for the program may control

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even more the costs of the indication program, developing specific circumstances for when indication feel shall be paid.

Identifications of a client basis for the implementation

It can be noticed that the indication programs demand that a client base shall be selected to be indicators, this is, to influence their network, making them clients. Although there are few academic researches referring the best group to be part of referral programs, a logic group of indicators includes current clients who are passionate for the service of a company and for the quality of a product, long term clients and clients with a name with excellent reputation (Berman, 2016).

Berman (2016) mentions studies that identified groups of consumers who served as excellent indicators. One was performed by Walsh & Elsner (2012) and states that specialists in the market offer more indications that the non-specialists and are capable of reaching a considerably higher conversion rate. In addition, the average ticket value of the requests performed through the indications of the specialists is higher than of the purchases performed through the indications of the non-specialists. Another study, performed by Kumar, Petersen & Leone (2010), established that clients with high LifeValue are not necessarily good indicators.

According to Fidelis (2020), the high rate of recommendation presents diverse results for different industries (Costa, Claro & Bortoluzzo, 2018). Clients who generate more businesses and revenue for the company are not necessarily the ones who present the higher intention of indication of their brand (Kumar, Leone & Petersen, 2007). It is necessary to have attention to what is referred to the declared disposition and one's real indication behavior.

Selection of the promotional media and content of the message

For programs of referral marketing, the internet is a great channel of dissemination of indications, since it offers different ways, such as the

Facebook, Twitter and LindkedIn. For such, the companies should consider the digital way to their programs, without considering only the interactions face to face by part of the indicators.

A study performed by Extole (2015), specialized software in indication programs, indicated that sharing by email were more effective, presenting higher conversion rate. It is also very popular the model "share with a friend", which consists in sharing a traceable link that identifies the indicator's code and, therefore, his/her indications and conversion. Regardless of the shape chosen, the success of big referral programs, such as Dropbox's, is linked to the simplicity of the mechanic and the way that it is explained.

On the other hand, when one talks about the message transmitted by the indicator, there is the option that it is previously directed by the responsible marketing team for the program, or totally written by the indicator. In the case of messages previously directed, links may be created that provide content of blogs, emails and already written messages for the indicators to share.

Determinations of the proper rewards

Regardless of the type of business that a referral programs is inserted, a good planning of rewards in indication marketing is essential, once the participants of the programs are themselves directly involved with the brand when some prize is offered, being created a relationship based on reciprocity. There are different possibilities for the rewards of the referral marketing programs, which may vary according to the available budget and the segment of the business. The rewards provided by indications may be in the form of vouchers, redeemable points, fidelity points, gift cards, donations to charity, free minutes.

The studies of Berman (2016) present a conflict of results between the researches that associate the rewards. On one hand, one of the researches points out that the probability of fulfillment of an indication, as well as its value have raised with the increase of the incentives offered in return (Wirtz & Chew,

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2002). On the other hand, a different research pointed out that, although offering a reward increases the probability of an indication, there was no different of effect between smaller and bigger rewards (Ryu & Feick, 2007).

In this step it is also necessary to define whether only the indicator will receive any reward, or if the indicator and the indicated part will both be benefited. In the study of Ryu & Feick (2007), it was discovered that the impact of the rewards program was much higher for one weaker brand in the market than for a stronger brand, already recognized and renamed in the market. As a result of such discovery, Ryu &Feick (2007) suggested rewarding only the indicator for weaker brands, which means, smaller and less recognized in the market, and rewarding both the indicator as well as the indicated for strong brands in the market.

Specification of the rules of the program

Referral programs are prone to abuses by part of the clients. This occurs since, in many programs, the reward is given regardless of how much time the new indicated clients remain in the company, for example. Even if the company is not committed to accept every indication, the fact that in incentive exists, added to the imperfect triage performed by the company, creates the possibility of abuse or fraud, scenery where the existing clients are rewarded by indicating low quality clients   (Schmitt, Skiera & Van Den Bulte, 2011).

Berman (2016) defends that the rules of the referral program should detail clearly the circumstances in which an indicator has the right to be rewarded for a performed indication. There are different formats to base the rule of reward of an indicator. The conditions may be based in clients who have signed up for the service (evaluation), continue to use the service for a certain period of time (fidelity) or make minimum purchases.

In some indication programs, it is not verified how much time the indicated client has used the company's service, or if there was devolution of

the acquired product. This creates potential situations of abuse, in which the indicators and the indicated may conspire within to share a reward. Therefore, it is recommended that rules shall be create to prevent scenery of devolution or unsign of the service.

In addition to defining which conditions generate the reward to the indicated and to avoid scenery of fraud, the rules also need to perform other determinations.   Deadlines for the indications, transference of awards, condition to become an indicator (such as purchase history), are some of the crucial points for the rules of a referral program. However, to make sure that such rules work, it is essential that shall be constant monitoring of the fulfillment of such.

Choice of the program's software

Berman (2016) considers that referral marketing programs demand specialized software. Such software is responsible for sending automatized emails to the indicators or potential indicator, collecting depositions about the program or brand, monitoring social media, tracking down the current clients' indications, tabling purchases of the indicated, performing sweepstakes and contests among the members of the program, thanking the indicators for their respective indications, calculating the payment, points or rewards of the indicators and keeping track of the total costs of the indication program.

Evaluation of the success or failure of the program

In the study of Berman (2016), it is stated that a program of referral marketing may be evaluated by different metrics, among them, the number of indicators who participate in the program, the degree of conversion of the client, the cost of acquisition of a new client by indication versus a new client via other marketing programs, and the value of each indicated client based on one's respective purchase history and average ticket, rate of retention and profit margin.

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Berman (2016) points out that a common mistake in the evaluation of a result from a referral program involves evaluating the program only by observing the number of the provided indications, instead of determining the money value of the indicated clients. It is necessary to understand the number of performed indications, but more than this, how many were really converted into clients and the money return of such conversions. Berman (2016) also defends that the understanding of how much time is need is necessary to evaluate the success or failure of a referral program, being from three months to a year, according to the complexity of each program.

METHODOLOGICAL PROCEDURES

This research follows a qualitative approach of descriptive character, and was performed through the study of multiple cases. A case study is an investigation based on the experience of a contemporary phenomenon within a context (Yin, 1994). Therefore, the studies of cases aim at deeper understanding and interpreting facts and specific phenomenon, providing the dissemination of knowledge, through possible generalizations or theoretical propositions that may appear from the study (Yin, 1994).

In this study, the behaviors of planning, implementation and evaluation of the referral marketing programs of the companies α, β and γ, inserted in the context of digital businesses, were compared to the theoretical model presented by Berman (2016). For the capture of the phenomenon from the perspective of the market situation, a data gathering was performed, through the interviews with the companies   α, β and γ.

The instrument of data gathering was a semi-open script interview, constructed based on the theoretical model presented by Berman (2016). Chart 1 presents the analyzed categories in the study and the script of the interview, based on each category, in addition to the categories of ambiance, which aims at bringing a context on organization in question and the role of

the interviewed in the organization and acting in the referral marketing program.

Chart 1. Semi-open interview script

Category	Questions
General profile of the interviewed	What position do you hold in the company today?
	Do you work directly with the program of *referral marketing*?
	What is your role today in face of the company's *referral marketing* program?
	Which activities related to the program of *referral marketing* do you execute today?
General profile of the organization	What is the scope of acting and size of the organization?
	For how long does the company exists?
Organization of the program	For how log does the *referral marketing* program exists?
	Is there anyone who looks exclusively to to program within the organization or is there hiring some third-party service which exclusively manages the program?
	Does the program receive attention from more than one area of the company?
	How does the planning of the *referral marketing* program occurs?
Budget planning	Is there a specific budget planning for the *referral marketing* program of the organization? If so, how is it done?
	What are the predictable expenses in the program's budget?
Identification of a base of clients for implementation	What are the basis of clients participating in the *referral* program?
	Is there an identification of any base that performs better? If so, which is?
Selection of the promotion media and content of	How is the indication performed by part of the indicator and its tracking?
	Through which media do the participants perform more indications

the message	today?
	Have you already identified a more effective channel for the indications? If so, which?
	Is the message passed by the indicator previously directed by the team responsible for the program? If so, how is this performed?
Determination of the proper rewards	Which are the rewards currently adopted in the *referral marketing* program of the organization?
	Is there a perception of the influence between the offered reward and the quality or volume of the performed indications?
	Does the organization's program of *referral* also offer rewards to the indicated? If so, which?
Specification of the rules of the program	What are the existing rules in the *referral marketing* program of your organization?
	Are there criteria that define whether an indicator is really fit to receive a reward for an indication?
	Has in any moment occurred the identification of any behavior of fraud? If so, which?
	Through which channels are the rules communicated and made available to the participants?
Choice of the program's software	Does the program use any software for the control? If so, which functions does it perform? If not, how is the control of the program performed?
Evaluation of the success or failure of the program	What are the metrics used for the control of the result of the *referral marketing* program of your organization?

Source: Elaborated by the authors based on the article of Berman (2016).

Based on the script of the research, three interviews were performed with the members of the companies α, β and γ. The interviews were individually recorded through a toll of video-conferencing Google Meet, having duration of 30 minutes, each, and were transcript. The interviewed signed a term of free consignment of the interview, authorizing its use.

To analyze the gathered data, the method of analysis of content was used, technique which has as purpose to organize and summarize data, with the purpose of obtaining answers of the researched theme (Gil, 2014; Levrini & Silveira, 2021). In the analysis of content, the content arrives in raw state and it is based on it that the analysis initiates so that the meaning of the hidden content in the data may be extracted. In this study, the analyzed content will be the interviews with the collaborators of the companies α, β and γ, which from their raw format, will have content and extracted meanings.

ANALYSIS OF THE RESULTS

Company a case

Profile of the interviewed and of the organization a

Company a is part of the food and drinks industries and it is present in the digital environment through an e-commerce, in which sells its products in retail for the final clients, who are physical people. Company a exists for six years and is currently considered a middle-sized company, according to the definition published in by the Brazilian Institute of Geography and Statistics (IBGE) and by the Brazilian Service of Support to Micro and Small Companies (SEBRAE), which is based on the number of employees for such classification, in such case, between 20 to 99 employees.

For the understanding of the process of planning, implementation and evaluation of its referral marketing program, an interview with the coordinator of the growth marketing was performed, area of marketing which aims not only at acquiring new clients, but also transforming them into long term consumers and promoters of the business.

The interviewed coordinator is part of the company's a chart of the employees since 2019 and, even if the program is located in another sector of the company, works directly with the referral marketing program. The interface of the coordinator occurs through the management and follow-up of the indicators, since the program is considered once of the levers for the growth of

the company, being a strategy that has the attention of the growth marketing team.

Planning, implementation and evaluation of the referral marketing program of company a

The referral marketing program of the company a exists for three years and it is the only existing in the company today. The program is responsibility of the customer experience sector, area that has the purpose to ensure that the client has the experience projected by the company during all the points of contact of one's journey as a consumer. Despite receiving an exclusive look from an analyst of the customer experience team, he has the attention and the interface with the other teams. In addition to the growth marketing team, which accompanies and generates the indicators of the program, the program also relies on the support of the content marketing team, which provides support to the production of graphic pieces for the official communications with the indicators. The mentioned facts totally agree with what is guided by Berman (2016) regarding the organization of the referral marketing programs.

Its strategic planning occurs monthly. During once a month, the customer experience team, responsible for the program, and the teams that make interface reunite for the analysis of the results and execution of tasks and actions from the previous month and planning for the following month. In that moment, it is defined the monthly calendar of actions. Demands are distributed and goals are aligned. After such, the follow-up occurs weekly through work reunions between the analyst responsible for the program and the leadership.

Regarding the budget planning, in company a there is no direct planning. A part of the envisaged budget is dedicated to the program, according to the need aligned during the planning performed monthly. In the general budget of the team, there is always prediction of direct expenses with the program, as guided by   Berman (2016), such as the paycheck of the

responsible analyst, tools used for the analysis and execution of the program, costs of the discounts given to the indicated, awards of the indicators and logistic of the reward sending. However, since there is no specific budget delimitation for the program, other costs may be included, according to the monthly planning such costs may encompass actions and gifts for the participants.

For the understanding of who the participants of the referral marketing program of company a are, it is necessary the previous understanding of two concepts. The first of them is the NPS (Net Promoter Score) scale. Created by Reichheld, the NPS scale regards a scale from 0 to 10 that quantitatively measures the level of satisfaction of fidelity of clients to the business (Bispo, Lodi & Spínola, 2021). Such scale is based on a direct question performed to the client after his/her experience with the brand, as for example "On a scale from 0 to 10, how much would you recommend us to a friend?". The grade indicated by the client classifies him/her as promoter, neutral or detractor of the brand. Promoter clients are considered the ones that give grade 9 or 10 in face of the questioning, promoter clients are those who tend to indicate the brand after the positive experience.

The second essential concept for the understanding of the participants of the referral marketing program of company a is the REM analysis, an analysis performed based on the clients, based on how recent, frequency and money value of the purchases of the client to help the segmentation of the base. The RFM Analysis classified numerically a client in each of these three categories, in a scale from 1 to 5, being the higher the attributed grade, the better the result. The best client is the one with maximum points in all categories. (Carvalho, 2020). The clients with the best results are those who give higher financial return to the organization.

The participants of the referral marketing program of company a are weekly invited by the analyst. There are three invited groups: the promoters of the NPS scale applied after the experience of the purchase on the website

and timely manner for the consumption of the product, the best clients based on the RFM Analysis and, at last, the closest and more engaged with the brand clients on social media, who have had already at least one experience with its e-commerce previously. The choice of such basis deals with the group of current clients who are passionate by the service, mentioned in the article of Berman (2016).

Although there is not currently in the organization any number analysis which indicates which of these three basis performs better with the indications, it has been already observed that the better performance is among the groups of promoters of th NPS and closer and more engaged clients with the brand in social media. Such fact conforms the theory presented in the study of Kumar, Leone & Petersen (2010), which indicates that the clients who give higher financial return are not necessarily good indicators.

The indications are performed through discount coupons and personalized links, which track down the indicator and compute the points according to the purchase performed by the indicated. The content of disclosure is free, but the indicators received updates and guidance on the current campaigns, just as graphic material for posting in social media, as the possibility presented by Berman (2016). To follow the guidance and suggested posts is not mandatory, the participant may always adapt him/herself about the way how he/she intends to disclosure the brand at ease.

Adopting such model, there is by part of the company a, the stimulation to disclosure through social media and not only face to face, as guided by Berman (2016), Despite not having specific rules that limit the disclosed content, there are rules regarding the channels of communication and formats of sending the indication, which will be posteriorly completely described in this study.

In face of the incentive to disclosure via social media, company a states that the biggest channel of disclosure of the program's participant is the social

media Instagram. The best performance of indications is also concentrated on this channel.

In the shape of the company's a program, there is reward both for the indicator as well as the indicated. The indicated, by performing a purchase with the discount coupon or link from the indicator, wins 10% discount on the value of its request. IN promotional actions, such discount may be higher or accumulated with some gift of the brand or free sample of products or products of partners. On the other hand, the indicator accumulate points according to the value of each request performed with his/her coupon or link. Such point may be exchanged for products or gifts of the brand. Despite the study of Berman (2016) presents ambiguity regarding the influence of the rewards in the volume and quality of the performed indication, in company a, it was observed that the better the offered rewards, the higher is the effort of the program's participants to perform indications, in order to reach the necessary punctuation for the exchange of the desired items.

The rules of the referral marketing program of company a are sent by e-mail at the moment when the indicator enters the program and are available on the program's website. They regard the form of the coupon's disclosure, in order to avoid competition with other channels of acquisition of new clients, conflicts between indicators and the mass sending of messages, which may harm the company's image and experience of potential clients. The rules limit comments of disclosure in publications in social media of other partners and on the brand's official website, just as the sending of mass messages to unknown people. In case the rules are not respected, the member may be laid off from the program.

Regarding the rules of scoring, it is only considered the use of coupon or link. Despite the article of Berman (2016) points out the importance of the definition of the rules for validation of the scoring to avoid fraud, the cancellation of the purchase by the indicated does not imply on the loss of scores acquires by the purchase. This format works well for the company a's

scenery, once it has never been identified a behavior of fraud among the participants.

The program initially was monitored by spread sheets and currently, follows what is indicated by Berman (2016), once it is controlled through the synchronization of the internal software of the company's request with a software developed internally which tables the scores of each request and the rescues solicited through the website. The data analysis are performed by PowerBI, a specific program for data analysis. On the other hand, the communications are performed through message apps and automatic emails sending, which are part of a marketing automatized software, used by several areas of the company.

In this case, several metrics and indicators are analyzed, being them the size of the base, the percentage of active clients on such base, which means, clients who perform indications, the amount of indications, the volume of new member, the Life Time Value, the cost of acquisition of clients through the program and the percentage of the program's revenue in face of the total revenue through e-commerce.

Company β base

Profile of the interviewed and of the β organization

Company β is part of the technology and health sector, offering an online recurrent signature service to provide physical training focused in improvement of the physical and cognitive performance, such as dance, functional training and aerobics. Company β has existed for eight years and is currently considered a middle-sized company.

For the understanding of the processes of planning, implementation and evaluation of its referral marketing program, the interview was performed with the referral marketing analyst. She works for company β for a year and has

always been directly involved with the program, with the role of ensuring its operation the best way, offering the best experience to the participants.

Planning, implementation and evaluation of the company β's referral marketing program

The referral marketing program of company β has existed for four years and, regarding the program's organization, follows what is pointed out by Berman (2016). It is the single referral marketing program existent in the company and receives an exclusive look by part of the marketing team's analyst, but is supported by the other fronts of the marketing team, just as by the team of products, customer experience and technology. The mentioned teams interact with the program, ensuring its functioning on the online program and data registry, just as producing and sending the communication content to the members.

The strategic planning of the program occurs monthly and is always aligned with the general strategies of the company predicted monthly. During the monthly planning, there is the understanding of the demands, which will be solicited for the teams that support the program, just as the demands of the responsible analyst and the definition of the contents, calendar of sending of those and actions of engagements of purchases in the month.

Regarding the budget planning of the program, it is included in the general budget of the team of operations and it is limited within a percentage by month fro the referral marketing program. Following what is guided by Berman (2016), in such budget the payment of rewards to the indicators, the paycheck of the responsible analyst and other expenses of the operation are included, just as the necessary tools for its functioning and financial expenses from the reward, with is monetary, and of the discount given to the indicated. n

Unlike what is indicated by Berman (2016), in company β there are no specific segmentation for the participation in the program. All the 600 thousand

users of the platform are able to participate in the referral marketing program. Even if all are able to perform indications, only active users are able to receive rewards for the performed indication. The active users are those who are with an active signature at the moment, which means, payers in the current month when the indication is performed.

Unlike the study of Berman (2016), in company β, the highlighted group regarding the quantity and quality of the indication is not observed based on any purchase behavior. In face of the base of users, it was identified by the company β that the best performance in indication is by the users with profile similar to digital influencers, which means, more outgoing in social media. It is highlighted that there is only a resemblance of the profile with digital influencers, the users with best performance are not necessarily influencers and are part of the referral marketing program, not having any other type of paid partnership with those.

The indications are performed through personalized links, which trace the indicator and add up the scores according to the signature performed by the indicated. The content to disclosure the personalized link is free and it is according to the indicator, even if those receive orientation according to the promotional campaigns that are occurring at the moment. There are also some rules as to the format and channels of indication, which will be described posteriorly in this study. The indications of the members of the referral marketing program of company β occur majority by social media, mainly Instagram and Telegram, being the Instagram the channel of best performance.

In face of the scenario of behavior of indications and orientations for such, company β presents three factors that agree with the statement of Berman (2016) on the importance of the online presence of referral marketing programs. The first of them, the orientation of disclosure of content in the digital environment. The second point, the highlight in the performance of indications performed in social media by more active and outgoing people in such

environment (with profiles similar to digital influencers). And, at last, the third point, which is about the identification of the fact that the higher volume and performance of indications occur in the disclosures performed by the social media.

In shape of the program of company β there is the reward for both the indicator as well as the indicated. The indicated receives 10% discount in the value of the annual signature of the platform. On the other hand, the reward for the indicator is monetary, at every effective and valid indication, the indicator receives R$50,00. There was never variation in the reward offered to the indicator, so, variations in the behavior and quality of indicator were never perceived when compared to the changes in rewards. Therefore, it is not possible to analyze, in the scenery of company β, if the quality and volume of the indications suffer influence of the offered rewards.

The program has clear rules that are available on the website and pp. The rules regard both the mechanic as well as the disclosure of the personalized link. The two first rules regard the validation of the indication, for an indication to be validated it needs necessarily to occur through the personalized link and the indicated need to go through the warranty period, which means, the indication is only validated after 30 days of the signature by part of the indicated, when the warrant is finalized it can no longer be canceled. There are also rules linked to the receive of the money reward.. They are the fact that the indicator needs to be an active user of the platform to have access to the reward, which means, to be with an active signature and current payment. In addition, the payments occur until the 20th of each month and should be solicited until the 10th to receive in the current month.

Berman (2016) states that the rules of the referral marketing program should detail clearly the circumstances in which the indicator has the right to be rewarded for a performed indication. Despite no fraud behavior has been identified in any moment during the four years of functioning of the referral

marketing program of company β, rules mitigate such type of behavior, just as possible ruptures of the expectation in the experience of the indicator.

As for the disclosure of the personalized link, the rules determine that it may occur freely regarding the content published by the indicator. All form of organic disclosure may be performed, existing prohibition only of the disclosure via paid add, which runs from the basic premise of the organic indication of referral marketing program.

Just as Berman (2016) indicates, the referral marketing program of company β has a specialized software. All the control of indications and solicitations of rescue of awards occurs through a software developed internally and integrated with the platform of signature of the company. The results are tabled and analyzed in a third platform, commercialized and developed for such purpose. The communications with the members, on the other hand, are performed through message apps and automatic sending emails, which are part of a marketing automation software, also used by other fronts of the company's marketing team.

To measure the results of the referral marketing program of company β, different indicators are analyzed, being them, the rate of frequency of indications (which indicates how many indications, in average, an indicator performs) and the rate of adhesion to the program (which indicates the percentage of the active base of clients who is part of the referral marketing program). In addition to these, are also analyzed the amount of sales, the amount of indicators enrolled on the program who are active in performing indications, the amount of signatures by the indicated that were canceled and the percentage of billing of the program in face of the total revenue of the company.

Company γ case

Profile of the interviewed and of the organization γ

Company γ is part of the sector of beauty products and is present in the digital environment through an e-commerce, in which sells its products in retail for the final clients. Company γ exists since 2020 and is currently considered a middle-sized company.

For the understanding of the processes of planning, implementation and evaluation of its program of referral marketing, an interview was performed with the leader of the team of Customer Experience, area responsible for the program within the company. The interview is part of the board of employees of company γ for two years and works directly with the program, once it is governed by her team. In the program, she executes a management role, being responsible for approving strategic proposals, keeping track of the budget flow and distributing tasks.

Planning, implementation and evaluation of the referral marketing program of company γ

The referral marketing program of company γ has existed since 2022 and it is the only existing in the organization, as indicated by Berman (2016). Berman (2016) also points out in the study the need to exist a person supervising and controlling exclusively the program, however in cases of companies that do not have a professional with expertise in the matter or available workforce, the indication is from a third party of such activity.

Due to the lack of workforce with expertise in the matter, there is no employee of the company who looks exclusively to the program currently, however, the leader of the team of Customer Experience counts on an analyst of its team, who, among other activities, executes the predicted strategies for the program, in addition to an external consultancy that will give and support them in the planning and execution of the program.

The external consultancy works through meetings of one and a half hour, which occur twice a week. In the first three months of the consultancy, the meeting serve to define the strategy of implementation and launch of the

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program. Currently, the meeting are enjoyed for the maintenance and planning for the following steps for the expansion and better evaluation of the program.

Unlike what indicates Berman (2016), currently the referral marketing program of company γ receives attention only from the Customer Experience team and from the design team, which produces graphic pieces for the communication with the clients. Company γ considers that other areas, such as the marketing of performance and content marketing areas should look to the program and for such, undoubtedly, would improve the scaling of performance of the program, however, with the activities of the quick development of the organization and the initial phase of the referral marketing program, this has not occurred yet.

As recommended by Berman (2016), the referral marketing program of company γ counts on a budget dedicated to it. The budget planning counted with an initial sum allocated to the launch and beginning of the program, in which only the value of the consultancy and the value referred to the rewards of the indicated and indicators of the program were predicted. As the analyst who attends the program performs other activities from the Customer Experience team, the paycheck is predicted in the general budget of the team and not in the direct budget of the program. From this, the indicator Return On Investment (ROI) was considered for the health evaluation and evaluation of the financial viability of the program. Based on the results of such indicator, it is also determined the budget for new actions and innovations in the program. Up to this moment, the results have been positive, enabling new actions such as gifts and content very month.

Regarding the participants of the program, company γ follows the logic group of current clients who are passionate by the service and by the products, mentioned by Berman (2016) in the study. They are willing to participate in three different groups of the e-commerce clients. They are, NPS promoters, who are

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those which gave scores from 9 to 10 in the applied research after the purchase and experience with the product. Participate in the program also clients with high recurrence of purchases, which means, with more than five requests on the website, in addition to engaged clients who also have a closer relationship with the brand in their social media.

Despite the little time and absence of data with numbers that register what was observed, for company γ, the best indicators are those that express more openly the enchantment for the company and for the products. This is observed in the performance of quality and volume of the indications, those coming from NPS promoters and more engaged clients and closer to the brand in the social media.

The participants receive a personalized traceable discount coupon. Therefore, the indicated may perform purchases in the website with the indicator's coupon and win 10% discount. The indicator, on the other hand, will accumulate scores according to each request performed with the coupon. The number of items acquired or the value of the products is not taken into consideration. The disclosure content is free for the definition of the indicator, however, the indicator receives graphic support material for posts, hints for posting and is nurtured by the brand's content on the benefits of the product weekly. The guidance serve as support to boost the results in indication, but there is no obligation in the fulfillment.

The guidance of the content, such as the graphic support material for the posting in social media, encourage the disclosure through such environment, according to what is oriented by Berman (2016) about avoiding only the encouragement to the indications face to face, fomenting the indications in the virtual environment. Therefore, the company γ considers that, currently, the higher number of indications occur through social media, mainly Instagram and message exchange apps such as the WhatsApp and Telegram. Despite the highest volume of indications occurring through Instagram, company γ identifies the message exchange apps as more efficient for

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conversion, and associates this to the fact that the contact through such apps is closer and more personalized between the indicator and the indicated, who tend to be closer when communicate with each other through such app.

In the format of the program of company γ, both the indicator as well as the indicated receive rewards. The indicated receives 10% discount in the requests performed with the discount coupon of the indicator. Such value may be altered in case of punctual promotional actions, such actions may also provide other advantages for the indicated, such as free samples or other products from the brand. On the other hand the indicator accumulates scores with the purchases from the indicated. Such scores, when accumulated, may be exchanged by products and gifts from the brand. Given the little time of the program's existence there has not been big changes in the options of rewards for the indicators, being such, there has not been observed alterations in the amount and quality of the indications based on the alteration of the offered rewards.

The rules of the referral marketing program of company γ regard only the disclosure of the discount coupon. Despite the free content, there are limitations as for the communication environments, avoiding competition between different channels of acquisition. This way, it is prohibited the disclosure of comments in publications of the company's official profile or in the profile of other partners, just as the paid boosting of post that have the discount coupon. The sending of mass messages having the disclosure of the coupon is also prohibited, with the purpose of preserving the company's image and avoiding the distress for potential clients. The rules are available on the program's website and communicated by email and, in case they are not followed, the participant will be notified. In case of recurrence, the participant is dismissed from the program.

The rules for validation of the indications, also guided by Berman (2016), on the other hand, has not occurred. When a request with a coupon from an

indicator is performed and its payment confirmed, the score is tabled. The cancellation of the purchase by part of the indicated does not imply in the withdrawn of the points from the indicator. Even without rules which determine the validation of a scoring after the purchase, it has never been identified any fraud behavior.

The program, unlike what was guided by Berman (2016), does not rely on any specialized software for the control of the indications and exchange of rewards. After seeing the possibility of the adoption of a specialized software in a near future, in the initial phase in which the program of referral marketing of company γ is, all the metrics and functioning are controlled by Excel spreadsheet and the information that nurture such spreadsheets are withdrawn from the internal software of registry of requests. All communications are performed through the message app WhatsApp and email sending by the automation tool of marketing, which was already used previously to the creation of the program by other teams of the company.

In company γ, in the initial phase in which the program is found, the analyzed metrics through extracted data are few. Meanwhile, only the Return Over Investment (ROI), the rate of active participants (performing and converting indications) and the liquid and raw revenue of the program are analyzed.

FINAL CONSIDERATIONS

This study had as purpose to understand how the process of planning, implementation and evaluation of a referral marketing program is configured in digital businesses. After the theoretical deepening on referral marketing and digital businesses marketing and the study of cases with the companies α, β and γ, it has become possible to perform comparisons between the cases, as well as understanding the current behavior of planning, implementation of referral marketing programs in digital businesses.

Berman (2016) states that a referral marketing program may be planned, implemented and evaluated in eight steps: (1) organization of the program, (2) planning of the budget, (3) identification of a base of clients for the implementation, (4) selection of the promotional media and content of the message, (5) determination of the proper rewards, (6) specification of the rules of the program, (7) choice of the program's software and (8) evaluation of the success or failure of the program.

Regarding the organization of the program, the companies α, β and γ follow what was indicated by Berman (2016), regarding the unity of the referral marketing program, which means, there are no other referral marketing programs in the same company. As to the attention focused on the program, although companies α and β have internal analysts who dedicate full attention to the program, company γ relies on an external consultancy for the development of the program. Therefore, it is possible to conclude that both the models of keeping track indicated by Berman (2016) work.

Still on the organization of the program, Berman (2016) indicates that for a better performance, it is necessary that other team, in addition to the team that looks directly to the referral marketing program, become involved. Companies α and β follow what is indicated and do not have observations on the possibilities of improvement of the development of the program associated to such point. On the other hand, in company γ, there is not such solid interface with the other teams and, in face of the recognition of the possibility of improvement in the performance linked to such fact, it was concluded that, just as Berman (2016) states, effective programs of referral marketing go through several areas.

Berman (2016) points out the importance of the budget planning for the control of the viability of the program. Despite performing the planning in distinct forms, the three interviewed companies perform this directly or indirectly and include the main costs linked directly to the program. It is not

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possible to associate the success of the performance of the program to the organization of the budget, however, it is possible to understand that such planning is essential to have clarity on the performance.

When dealing with the base of eligible clients, companies a and γ work in a similar way, selecting clients promoters from the NPS (Net Promoter Score), just as those who have greater interaction and proximity with the brand in social media and that have the best consumption performance. In both companies, the best performance in indications is concentrated on the greater admirers of the brand, which is, promoters from the NPS and the ones with higher engagement and proximity in social media. On the other hand, company β opens the program to the participation of any active user and sees the best performance on more outgoing people in posts in social media. Such facts enable the conclusion that, just as Kumar, Petersen & Leone (2007) state in the up-mentioned study by Berman (2016), clients who generate more businesses and revenue to the company are not, necessarily, the ones who present higher intention of indication.

Looking at the selection of the promotion media and content of the message, none of the involved companies determine the content that should be disclosed by the indicator. However, all of them guide on the line of communication that should be followed and encourage, through such orientations, the indications through social media, just as indicated by Berman (2016). In face of this, companies a, β and γ see the best performance of indications through social media, mainly Instagram and WhatsApp, unlike the study of Extole (2015) mentioned by Berman (2016), which indicated the best volume of indications through the email.

Regarding the rewards, the three companies adopt the model mentioned by Ryu and Feick (2007) and reward both the indicator as well as the indicated. All of them enable to the indicated the discount in the consumed product. On the other hand, to the indicator, in companies a and γ, the rewards are products or gifts from the brand, meanwhile in company β

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the reward is financial. This study, just as the article from Berman (2016), does not come to a conclusion regarding the influence of the offered rewards to the indicators on the performance of the quality and quantity of indications. This occurs since the perception of influence between the offered reward and the quality and volume of the performed indications occurred only in company α. In companies β and γ, there has never been alterations in the offered rewards, therefore, there has never been observed alterations in the behavior of indications based on that.

As for the specification of the rules of the program, Schmitt, Skiera & Van den Bulte (2011) indicated that referral marketing programs are prone to abuse in programs that do not determine the conditions for validation of an indication, in addition to the purchase by part of the indicated. Although all the interviewed companies have clear rules linked to the communication of the indication, only company β has rules linked to the validation of an indication that go beyond the purchase with the use of the indicator's code. Although companies α and γ do not have such determinations, there has never been identified any fraud behavior or any attempt of such, by part of the users, just as in company β. Therefore, it is possible to conclude that the nonexistence of validation rules in indications of referral marketing programs, even if there are openings for such, do not necessarily leads to the occurrence of fraud.

Berman (2016) also states that referral marketing programs demand specialized software for their management and performance of activities linked to the program. Companies α, β and γ, although are in different stages in the advance of the automatic control of data and activities linked to the program, prove that a totally integrated software is not essential for the functioning and control of a referral marketing program. Even if a specialized software helps even more the monitoring and performance of a referral marketing program, it is possible to initiate the program through control and

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more manual communication, and then, move on to something more improved and automatized.

For the analysis of the success or failure of the program, Berman (2016) considers that several metrics may be used. Different metrics are used in companies α, β and γ, however, all of them follow what was indicated by Berman (2016) regarding the analysis not only of the volume of the indications, but of their financial return.

In face of the analysis and comparison of the processes of planning, implementation and evaluation of the referral marketing programs in companies α, β and γ, the main absorbed conclusions are linked to the groups of better performance of indication and better channels of performance of indications. In face of the better and the best performance of indications occur in social media and online message apps, it becomes evident the importance of the incentive of the indications through such channels, in addition to the classic indication that occur personally. Such incentive may occur through the orientations of disclosure or even through the offering of extra rewards.

Analyzing the processes of planning, implementation and evaluation of the referral marketing programs in digital businesses, it is highlighted that the non-correlation between performance of consumption from a client and the performance in indications. Just as Kumar, Petersen and Leone (2007) state in the study mentioned by Berman (2016) more profitable clients regarding the purchase behavior are not necessarily the ones who better performance in indications. In companies of the digital scope, are highlighted in the performance of indications clients who are truly enchanted with the brand, illustrated in this study as the promoters of research of NPS (Net Promoter Score) and engaged clients and close to the brand through their social media.

Another highlight point of this study is the possibility of initiation of a referral marketing program without the need of using robust softwares for control and communication with indicated and indicators. It is possible to initiate such

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control in a less automatized way, through spreadsheets and simple integration with operational systems and of marketing integration already existing in the organization.

As a limitation of the present study, in face of the small sample and distinct results, due to different behaviors and justification regarding the exchange of rewards to the indicators, this study does not allow generalizations about the influence of such rewards in the performance of the indications. Therefore, it becomes necessary deeper studies on the theme and such correlation.

This study was not deep regarding the best metrics to analyze more efficiently the success or failure of a referral marketing program in digital businesses. In such sense, it is suggested that deeper future studies on such theme, which will be of great relevance to the market, helping in the best analysis of return of the strategy.

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