

## Factors Associated with Customer Willingness to Refer Leads to Salespeople

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### **Abstract:**

This paper develops and tests a model that examines factors that may contribute to customers' willingness to provide referrals to their salespeople. Data were collected in a business-to-business setting. Responses were received from 406 decision-makers. The model was tested using structural equations modeling. Findings suggest that the customer's appraisal of the relationship directly influences customer willingness to provide referrals. This study found that customer trust of the salesperson and customer satisfaction with the salesperson influence the customer's appraisal of the relationship. Additionally, conflict with the salesperson was found to have a negative influence on the customer's appraisal of the relationship and the customer's expectation to continue the relationship. Finally, customer expectation of continuing the relationship did not influence customer willingness to provide referrals.

**Keywords:** customer | leads | salespeople

### **Article:**

#### **1. Introduction**

“Go forth and build long-term customer relationships.”

This admonition seems to be the current commandment of both academicians and practitioners to salespeople—and, with good reason. Research has shown that building long-term customer relationships can increase a firm's overall profitability Kalwani and Narayandas, 1995, Reichheld, 1994. Another important benefit of long-term relationships is that loyal customers are likely to be willing to provide referrals. Referrals that turn into customers tend to remain with the organization longer and are more profitable than customers who respond to advertising, sales pitches, or price promotions (Reichheld, 1996, p. 48).

Getting existing customers to provide referrals should be one of the best ways to add new business. Therefore, it is surprising that referrals are often overlooked by businesses (Connors, 1998) and the subject of very little academic research (Boles et al., 1997). Bachrach (1999) describes a study conducted by the Toronto Stock Exchange in which customers were asked if they would be willing to provide referrals to their stockbroker. Ninety-four percent of

them said they would. Then, the same customers were asked if they had ever been asked by their stockbroker for referrals. Only 11% said yes. The purpose of this paper is to examine factors that are associated with a customer's willingness to provide referrals to their salespeople.

## 1.1. Factors contributing to a customer's willingness to refer

### *1.1.1. Relationship appraisal with the salesperson*

Practitioner literature suggests that referrals result from the salesperson and customer having a good relationship Connors, 1998, Cates, 1999. From an academic perspective, one of the few empirical studies to examine referrals found that high levels of relationship quality with the salesperson are associated with customer likelihood of referring business to the salesperson (Boles et al., 1997). The paucity of empirical research makes it difficult to draw conclusions regarding factors that lead to customer referrals. However, it seems possible that when customers have a positive overall appraisal of the cumulative interactions with their salesperson, they are more likely to provide referrals.

Anderson et al. (1998) maintain that buyers will respond in a way that is consistent with what they receive from the seller. A buyer who perceives the salesperson to be indifferent will probably be indifferent towards the salesperson. Conversely, a buyer who perceives that the salesperson gives a great deal to the relationship will desire to give a great deal back. We propose that when customers have a positive overall evaluation of the buyer–seller relationship, they will have a desire to give something back to the salesperson. We refer to this overall evaluation as relationship appraisal. We define relationship appraisal as the buyer's global assessment regarding the overall nature of the buyer–salesperson relationship. Therefore, we offer the following hypothesis:

**Hypothesis 1.** Customers who have positive appraisals of their relationship with their salesperson are more likely to provide their salesperson with referrals.

### *1.1.2. Perceived relationship continuity*

Researchers in labor relations negotiations have found that repeated interactions with the same individual increased the desire for individual willingness to help their partner (Falk et al., 1999). Therefore, it may be that when the buyer expects the relationship to continue, they will be more likely to reciprocate by providing referrals to the salesperson. This assertion has some support in the practitioner literature, which suggests that the easiest referrals come from clients with whom the salesperson has an ongoing relationship (Washburn, 1996). Additionally, the marketing literature maintains that when there is an expectation of relational continuity, relational behavior should be fostered (Noordewier et al., 1990). We propose that the buyers' perception of relationship continuity will influence their willingness to provide referrals. Similar to other marketing studies (e.g. Heide and John, 1990), we define perceived relationship continuity as the probability of future interaction between the selling and the buying firms. Therefore, we offer the following hypothesis:

**Hypothesis 2.** Customers who perceive high levels of relationship continuity are more likely to provide referrals to their salespeople.

We have hypothesized that perceived relationship continuity and relationship appraisal directly influence customer willingness to provide referrals. We maintain that these two variables (perceived relationship continuity and relationship appraisal) are related. The marketing literature suggests that a positive evaluation of a relationship with the salesperson can influence a customer's expectation that they will continue to interact with the seller in the future (Crosby et al., 1990). Similarly, a study of retail customers indicated that factors that contribute to close buyer-provider relationships are affective, rather than situation or behavioral (Barnes, 1997). In the marital relationship literature, Norton (1983) found that relationships in good emotional shape were more likely to continue. We suggest that the overall appraisal of the relationship will influence the likelihood that the relationship will continue. Therefore, we offer the following hypothesis:

**Hypothesis 3.** Customers who perceive positive appraisals of their relationship with their salesperson are more likely to expect the relationship to continue.

### *1.1.3. Satisfaction*

Satisfaction is an important variable to building interfirm relationships (Michie and Sibley, 1985). At one time, customer satisfaction seemed to be of critical importance to practitioners. This is evidenced in slogans that were used in the late 1980s and early 1990s, such as Ford Motor's "Satisfaction is Job 1." While satisfaction no longer plays "the" central role in recent buyer-seller relationship models, it is still viewed as important to the overall buyer-seller relationship (Reichheld, 1996). Researchers have found that as a buyer is more satisfied with a supplier, they view the supplier more positively (Dorsch et al., 1998). Additionally, satisfaction with the salesperson has been found to be an important element in the buyer's overall assessment of the quality of the relationship (Crosby et al., 1990). We define buyer satisfaction with the salesperson as an emotional state that occurs in response to an evaluation of the buyer's cumulative experiences with the salesperson Crosby et al., 1990, Westbrook, 1981. We propose that the buyer's satisfaction with the salesperson has an impact on the buyer's overall evaluation of the relationship with the salesperson. Therefore, we offer the following hypothesis:

**Hypothesis 4.** Customers who have higher levels of satisfaction within the buyer-salesperson relationship are more likely to have positive appraisals of their relationship with their salesperson.

### *1.1.4. Conflict*

Conflict is inherent in buyer-seller relationships due to the different goals of the two parties (Weitz and Bradford, 1999). There are a variety of opportunities for conflict in buyer-salesperson interactions. For example, conflict can stem from situations in which the customer wants to negotiate a lower price but the salesperson is compensated on the profit margin of the product. We define conflict as the buyer's perceived tension with the salesperson that results from incompatible goals (Gaski, 1984).

Conflict may have a negative outcome on the buyer–seller relationship, unless it is effectively managed (Weitz and Bradford, 1999). Additionally, it is likely that unresolved conflict would ultimately lead to the dissolution of relationships (Surra and Longstreth, 1990) and lower levels of satisfaction Anderson and Narus, 1990, Brown and Day, 1981, Gaski, 1984. Therefore, we offer the following hypotheses:

**Hypothesis 5a.** Customers who perceive lower levels of conflict within the buyer–salesperson relationship are more likely to have positive appraisals of their relationship with their salesperson.

**Hypothesis 5b.** Customers who perceive lower levels of conflict within the buyer–salesperson relationship are more likely to have higher levels of satisfaction with their salesperson.

**Hypothesis 5c.** Customers who perceive lower levels of conflict within the buyer–salesperson relationship are more likely expect the relationship to continue.

#### *1.1.5. Trust*

Trust is a fundamental building block for constructing solid buyer–seller relationships Morgan and Hunt, 1997, Wilson, 1995. One reason that trust is essential is that it encourages both parties to freely exchange information and to explore innovative solutions to problems (Weitz and Bradford, 1999). Information exchange is a critical element that enables the salesperson to perform the role of a value-added provider. Without knowledge of the customer's business, the salesperson is not in a position to make recommendations that impact a firm's unique value chain.

Trust is generally built over time as a result of repeated exchange interactions (Nevin, 1995). In the early stages of a relationship, the buyer will begin to make assessments as to whether the salesperson can be trusted. For example, does the salesperson follow up with the buyer when promised? Is the salesperson providing information that seems reasonable or is consistent with the buyer's knowledge of the product? Through repeated interactions, buyers begin to feel confident that their salesperson will act in a way that is in the buyer's best interest. Similar to other researchers, we define trust as having confidence that the salesperson can be relied upon to behave in a manner that serves the long-term interest of the customer Crosby et al., 1990, Wilson, 1995.

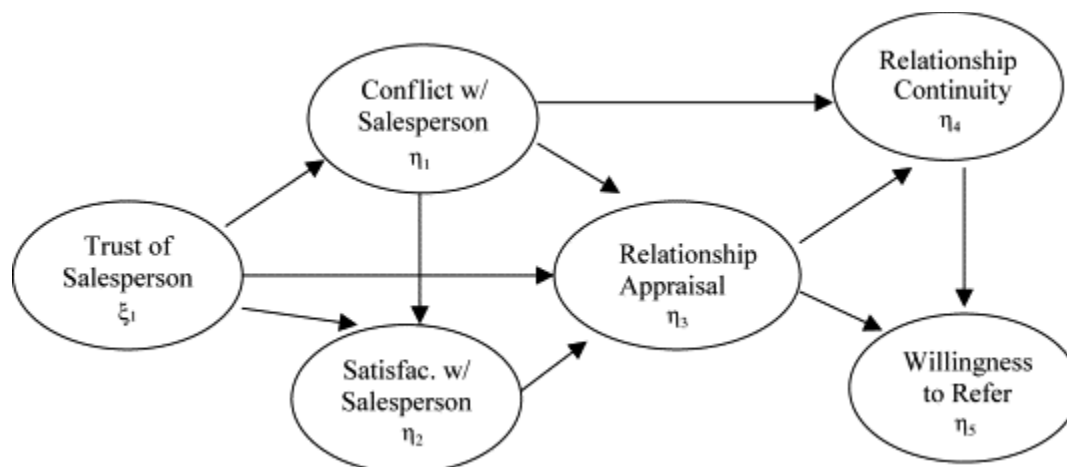
A recent meta analysis examining the role of trust in buyer–salesperson relationships found that one consequence of trust is positive customer attitudes (Swan et al., 1999). Trust has also been found to be directly related to lower levels of conflict Anderson and Narus, 1990, Young and Wilkinson, 1989 and higher levels of satisfaction Anderson and Narus, 1990, Smith and Barclay, 1997. We propose that customers' assessments of the degree of trust they have in their salesperson will influence their overall evaluation of the buyer–seller relationship, the level of satisfaction and the level of conflict in the relationship. Therefore, we hypothesize that:

**Hypothesis 6a.** Customers who perceive higher levels of trust within the buyer–salesperson relationship are more likely to have positive appraisals of their relationship with their salesperson.

**Hypothesis 6b.** Customers who perceive higher levels of trust within the buyer–salesperson relationship are more likely to have lower levels of conflict with their salesperson.

**Hypothesis 6c.** Customers who perceive higher levels of trust within the buyer–salesperson relationship are more likely to have higher levels of satisfaction with their salesperson.

The proposed hypotheses will be tested using a structural equations modeling approach. The overall model to be tested is shown in Fig. 1.



**Fig. 1.** Factors associated with customer willingness to refer leads to the salespeople.

## 2. Methodology

Buyers of a business-to-business service were surveyed. Depth interviews and focus groups were conducted with several customers before designing a pretest. A pretest questionnaire was sent to a random sample of 300 customers. Each customer was contacted by phone and was asked to participate. One hundred and forty-six customers responded to the questionnaire. Based on results of the pretest instrument, the final questionnaire was refined.

For the current research, a systematic random sample of 1050 customers was drawn from a mailing list provided by the supplier firm. After deleting duplicate addresses, inaccurate addresses, and customers for whom no contact name was available, 1013 remained. Four hundred and six completed questionnaires were returned, for a 40.1% response rate. Buyers spent, on average, US\$50,000 annually with the supplier firm. Respondents represented firms from all industries (21% were in manufacturing, 21% were in wholesaling, 8% were in retailing, 36% were in a service industry, 2% were in agriculture, and 12% were in other industries). Most respondents indicated that they were solely responsible for the purchase of the service for their firm. Nonresponse bias was assessed by comparing early respondents with late

respondents (Armstrong and Overton, 1977). No significant differences were found on any of the constructs used in the study ( $P > .10$ ).

## 2.1. Measures

Table 1 contains the items, scale composite reliability, standardized loadings, and the  $t$  values of each item in each scale. All of the scales (except where noted) were measured on a Likert format ranging from 1 (*strongly disagree*) to 7 (*strongly agree*). Previously validated scales were the starting point for all measures. Based on pretest scale composite reliabilities, we used reduced item scales to measure relationship appraisal and trust in the final questionnaire.

**Table 1.** Construct measurement summary and confirmatory factor analysis and scale reliability

Item <sup>a</sup>	Item description summary	Standardized loading	$t$ value
<i>Conflict with salesperson</i> ( $\rho = .85$ )			
Confct1	My relationship with my salesperson can best be described as tense.	.80	15.49
Confct2	My salesperson and I have significant disagreements in our working relationship.	.82	15.85
Confct3	My salesperson and I frequently clash.	.74	14.49
<i>Buyer satisfaction with salesperson</i> ( $\rho = .98$ )			
The following describe your relationship with your salesperson:			
Sat1	Satisfied (1) ... Dissatisfied (7) (R)	.96	25.07
Sat2	Pleased (1) ... Displeased (7) (R)	.98	25.68
Sat3	Favorable (1) ... Unfavorable (7) (R)	.98	25.77
<i>Trust of salesperson</i> ( $\rho = .89$ )			
Trust1 (R)	I find it necessary to be cautious in dealing with my salesperson.	.68	14.88
Trust2 (R)	My salesperson is not above "bending the facts" to create the impression he/she wants.	.89	21.54
Trust3 (R)	I suspect that my salesperson has sometimes withheld certain pieces of critical information that might have affected my decision making.	.87	20.85
<i>Perceived relationship continuity</i> ( $\rho = .84$ )			
Cont1 (R)	I do not expect my firm's relationship to last much longer.	.84	19.13
Cont2	I expect my firm's relationship to continue.	.93	21.30
Cont3	My decision to continue my firm's relationship is virtually automatic.	.71	15.52
<i>Relationship appraisal of salesperson</i> ( $\rho = .95$ )			
I would characterize my relationship with my salesperson as ...			
Eval1	... good.	.95	24.43
Eval2	... strong.	.94	24.00
Eval3	... happy.	.93	23.30
Eval4	The quality of my relationship with my salesperson is excellent	.81	19.09
<i>Customer willingness to refer</i> ( $\rho = .95$ )			
Refer1	If my salesperson asked me for the names of other prospective business customers, I would be happy to give them.	.91	22.31
Refer2	I would not have a problem giving referrals to my salesperson.	.86	20.35
Refer3	I would provide referrals to my salesperson if he/she asked for them.	.90	21.93

<sup>a</sup> Scale composite reliability =  $\rho_c = [(\sum \lambda_i)^2 \text{var}(\xi)] / [(\sum \lambda_i)^2 \text{var}(\xi) + \sum \theta_{ij}]$ ; Bagozzi and Yi, 1988, p. 80).

The measures for trust (scale composite reliability  $\rho = .89$ ) and satisfaction (scale composite reliability  $\rho = .98$ ) were adapted from Crosby et al. (1990). Items in the satisfaction scale were

anchored by a set of bipolar adjectives. The conflict measure (scale composite reliability  $\rho=.85$ ) was adapted from Kumar et al. (1992). Expectation of continuity (scale composite reliability  $\rho=.84$ ) was adapted from Noordewier et al. (1990). The referral measure (scale composite reliability  $\rho=.95$ ) was adapted from Boles et al. (1997). Finally, the relationship appraisal measure (scale composite reliability  $\rho=.95$ ) was adapted from Norton (1983).

### 3. Results

Analyses were conducted using LISREL 8 in accordance with Anderson and Gerbing's (1988) two-step approach. The correlation matrix was computed using PRELIS 2. Table 2 shows the correlation matrix.

**Table 2.** Correlation matrix

	X <sub>1</sub>	X <sub>2</sub>	X <sub>3</sub>	X <sub>4</sub>	X <sub>5</sub>	X <sub>6</sub>
Satisfaction with salesperson	1.00					
Conflict with salesperson	-.48	1.00				
Relationship appraisal	.66	-.53	1.00			
Perceived relationship continuity	.33	-.47	.42	1.00		
Willingness to refer	.38	-.32	.57	.31	1.00	
Trust of salesperson	.57	-.69	.55	.37	.33	1.00

#### 3.1. Measurement model

The measurement model was analyzed using all 19 items. All items performed well and were retained in the model. The chi-square of the measurement model was 270.34 with 137 degrees of freedom ( $P<.01$ ). The large chi-square value was not surprising since the chi-square statistic in LISREL has been shown to be directly related to sample size (Cudek and Browne, 1983). Other goodness-of-fit indices less affected by sample size indicated that the model achieved a good fit (GFI=.94; AGFI=.91; standardized RMR=.03; CFI=.98; RMSEA=.05).

All items had large and significant loadings on their latent construct, indicating convergent validity (see Table 1). Discriminant validity was assessed by constraining the estimated correlation parameter ( $\phi_{ij}$ ) between constructs to 1.0 and performing a chi-square difference test on the values obtained for the constrained and unconstrained models (Joreskog, 1971). Results provide strong evidence of discriminant validity among the constructs.

#### 3.2. Structural model

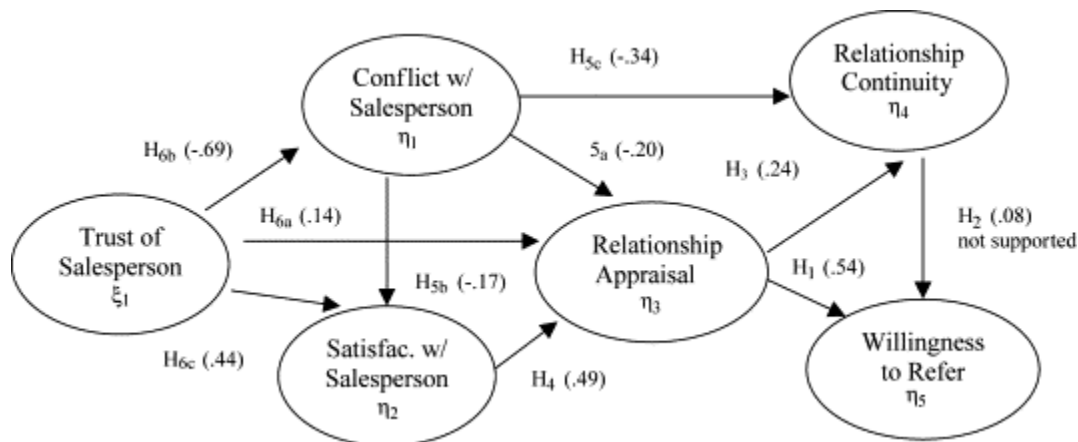
Results of the model indicate the model fits well (Table 3). The chi-square is significant [ $\chi^2_{(142)}=274.73, P<.01$ ], which is not unexpected given the sample size. The model performed favorably on other fit diagnostics. Specifically, GFI=.93, AGFI=.91, and CFI=.98. Also, the RMR of .04 is also below the suggested value of .05 or lower (Byrne, 1989). Additionally, the RMSEA value of .05 indicates a close fit of the model (Browne and Cudek, 1993).

**Table 3.** Structural model results

Relationship	Hypothesized model		
	Standardized parameter estimate	<i>t</i> value	Hypothesis supported
Relationship appraisal with salesperson → customer willingness to refer (Hypothesis 1)	.54	9.35	Yes
Perceived relationship continuity → customer willingness to refer (Hypothesis 2)	.08	1.53	No
Relationship appraisal of salesperson → perceived relationship continuity (Hypothesis 3)	.24	4.14	Yes
Satisfaction with salesperson → relationship appraisal of salesperson (Hypothesis 4)	.49	9.05	Yes
Conflict with salesperson → relationship appraisal of salesperson (Hypothesis 5a)	-.20	-3.03	Yes
Conflict with salesperson → satisfaction with salesperson (Hypothesis 5b)	-.17	-2.40	Yes
Conflict with salesperson → perceived relationship continuity (Hypothesis 5c)	-.34	-5.18	Yes
Trust of salesperson → relationship appraisal of salesperson (Hypothesis 6a)	.14	2.09	Yes
Trust of salesperson → conflict with salesperson (Hypothesis 6b)	-.69	-10.39	Yes
Trust of salesperson → satisfaction with salesperson (Hypothesis 6c)	.44	5.98	Yes
<i>Fit statistics</i>			
$\chi^2$	274.73		
Degrees of freedom	142		
RMSEA	.05		
GFI	.93		
AGFI	.91		
RMR (Standardized)	.04		
CFI	.98		



Nine of the 10 hypotheses were supported. Parameter estimates and  $t$  values for the hypothesized relationships are also shown in Table 3. Only one of the two hypotheses dealing with customer willingness to refer was supported. Specifically, the customer's appraisal of the relationship is related to willingness to refer (Hypothesis 1;  $t=9.35$ ), but a customer's expectation that the relationship would continue is not (Hypothesis 2;  $t=1.53$ ). The two hypotheses dealing with perceived relationship continuity are supported. The customer's appraisal of the relationship is positively related to a customer's expectation that the relationship will continue (Hypothesis 3;  $t=4.14$ ). Conversely, customer conflict with the salesperson is negatively related to the customer's expectation that the relationship will continue (Hypothesis 5c;  $t=-5.18$ ). All three hypotheses associated with relationship appraisal are supported. Both satisfaction with the salesperson (Hypothesis 4;  $t=9.05$ ) and trust of the salesperson (Hypothesis 6a;  $t=2.09$ ) are positively related to positive customer appraisals of the relationship. As expected, conflict with the salesperson is negatively related to customer appraisals of the relationship (Hypothesis 5a;  $t=-3.03$ ). Conflict with the salesperson also is negatively related to a customer's satisfaction with the salesperson (Hypothesis 5b;  $t=-2.40$ ). Finally, trust of the salesperson is positively associated with satisfaction with the salesperson (Hypothesis 6c;  $t=5.98$ ) and lower levels of conflict with the salesperson (Hypothesis 6b;  $t=-10.39$ ). The final model is shown in Fig. 2.



**Fig. 2.** Final model: factors associated with customer willingness to refer leads to the salespeople. All paths are significant and hypotheses are supported unless otherwise noted. Standardized parameter estimates are indicated in parentheses.

#### 4. Discussion

This is one of the few empirical studies that examines factors that are significantly related to a customer's willingness to provide sales referrals. Our study found that trust, satisfaction, conflict, and the overall appraisal of the relationship with the salesperson were important factors in a customer's willingness to refer.

Most salespeople ask for referrals when they close the sale (Graham, 1996). However, our research indicates that this may not be the most appropriate time. The appropriate time appears to be when the customer has a positive overall appraisal of the relationship. It is possible that this positive appraisal may come before the customer decides to buy, after the customer has purchased, or even in cases where the customer decides not to purchase. One conclusion from this study is that salespeople need to be able to determine when the customer has a positive

overall appraisal of the relationship. It may be that the customer provides cues that could help the salesperson ascertain the customer's appraisal of the relationship. For example, positive relationship appraisal cues could be statements such as “I really appreciate what you've done for me,” or “thanks for helping me out, most salespeople I know aren't as responsive as you.”

This research uncovered several factors that are related to the customer having a positive appraisal of the relationship. One factor involves the reduction or elimination of conflict in the buyer–salesperson relationship. However, this may be difficult given that conflict is inherent in buyer–salesperson relationships (Weitz and Bradford, 1999). Therefore, it may be that it is more important for salespeople to be adept at resolving the conflict with the customer rather than focusing on eliminating conflict. Sales managers may want to focus on providing conflict management training so that conflict in the relationship is functional rather than dysfunctional. Another important reason to manage conflict effectively is that customers who perceive that there is little unresolved conflict are more likely to remain in the relationship. Therefore, it appears that conflict (or lack thereof) plays an important role in the overall profitability of a firm. The reason for this is that customers who remain with a firm longer are more profitable (Reichheld, 1996).

Another way to reduce conflict between the salesperson and the customer is for the customer to have high levels of trust in the salesperson. Trust is also essential in having satisfied customers who have a positive appraisal of the relationship. It may be that salespeople can have high levels of trust in their relationships with their customers by doing what they promised and by keeping the customer's best interest in mind when making recommendations.

Satisfaction with the salesperson is also important in our model. It is interesting that satisfaction's role with the relationship continuing and customers providing referrals appears to be indirect, operating through the customer's appraisal of the relationship. This also provides support to the assertion that satisfaction, while important, is not a key variable to customer loyalty (Reichheld, 1996).

Another interesting finding of this study is that the customer does not have to expect the relationship to continue in order to provide referrals. One reason for this could be that customers expect the relationship to continue because they are contractually locked into the relationship. Another reason may be due to inertia. The customer either does not have the desire or has not taken the time to switch suppliers. In both of these cases, it is possible that the customer is remaining in the relationship but does not necessarily have a positive appraisal of the relationship. Regardless of the reasons, it appears that the customer's expectation that the relationship will continue is not enough to motivate them to provide referrals.

While this study helps us to better understand factors leading to customer referrals, it has limitations. Data were gathered from customers of one company which limits the generalizability of the study. However, respondents represented firms from a wide cross-section of industries. While this does not ensure generalizability, it provides some evidence that the sample is representative of a larger business population.

Future research may want to examine a broader spectrum of companies. Additionally, longitudinal data would provide more insight into factors that are associated with a customer's willingness to provide referrals. Future research may want to focus data collection at the time a sale is closed to determine the impact of asking for a referral when the sale is closed. This should be compared to asking customers for referrals when they have a positive appraisal of the relationship. Another area for research is to determine which customer cues indicate that they have a positive appraisal of the relationship.

In some industries, such as life insurance, getting referrals makes the difference between an individual being a very successful salesperson or being a salesperson who is looking for other employment. This study is one of the only studies to examine customer referrals empirically. Because referrals are important to both the salesperson and the selling firm, future research could help shed more insight into successfully gaining quality sales referrals.

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