

## Ep #327: How to Home Edit Your Referrals



**Full Episode Transcript**

**With Your Host**

**Stacey Brown Randall**

**Stacey Brown Randall:** Have you ever watched the show on Netflix called The Home Edit? I think there are only two seasons of it. Now, here's the thing. If you've never watched the show, I still want you to stick with me

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through this podcast episode, because I'm going to dive in and show you how you can home edit your referrals. I promise. It'll be fun. Come on.

Hey there, and welcome to episode 328 of the Roadmap to Referrals podcast, a show that proves you can generate referrals without asking or manipulation.

I'm your host, Stacey Brown Randall. My journey from a business failure to a successful business now 10 years in, I know generating referrals naturally and consistently has made all the difference. Working with clients around the world, we leverage the science of referrals, protect relationships above all else, and help you build a referable business.

So way, way, way back in episode 57, so right after the podcast hit its one-year mark, so way, way back in episode 57, I talked about the six ways to Marie Kondo your referral process. Meaning, I took the KonMari system that Marie Kondo built and teaches for organizing your home.

If you are having trouble placing it, it's the, if it doesn't give you joy, release it and let it go. Okay, so maybe you know what I'm talking about. Maybe you have no idea. But anyways, back in episode 57, I took her system that she teaches for organizing your home and had a little fun and applied it to referrals.

So now I'm going to apply another organizing show's system called The Home Edit. I'm gonna apply their four-step process for organizing a home to referrals. So it's been a really long time. Figured we would do for another one.

And I'm a big fan of The Home Edit. So maybe you've watched the show. Maybe you love it. Maybe you're like, oh, this is gonna be great. Maybe you're sitting there thinking to yourself, I have no idea what show you're talking about. You just, seriously, you don't know what you're missing.

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But if it's not your cup of tea, don't worry, I am gonna try to make this a fun episode, but make no mistake, it will be valuable regarding referrals as well.

Okay, so here's a little background on the Home Edit system. So the Home Edit has like four main steps in their organizing process. First is Edit, then Categorize, third is Contain, and finally is Maintain.

So they are also really big into creating systems so that your organization is not only functional, but also pretty. You may have seen their rainbow organizing system. And yes, if you are wondering if I organize this way, I do, but mostly only my closet because literally no one else in my family will keep the rainbow alive.

I can't tell you how many times I've attempted to do it in my daughter's bedroom. And it looks fabulous for like 32 seconds. So let's dive in though. Let's talk about how we can apply The Home Edit system for organizing beautifully to your referrals. Alright, let's take them step-by-step.

First up is edit. Now, The Home Edit method places an emphasis on resisting the urge to just start organizing all of your stuff. Instead, it focuses on taking everything out and grouping like items together.

So if you were doing a closet, it's like take everything out of the closet. The closet will be bare. And then group like items together. And then you do the editing part of this step, which is, you know, getting rid of the stuff you just don't want or need, and you don't plan on using. So get rid of it, right? Donate it, trash it, whatever you're going to do with it. Recycle it.

But the idea is that you take everything out, you put like items together, and then you start editing what you don't need and getting rid of the things that you don't need, because that really is how you're going to maximize valuable space. And of course, they're a big believer in starting with one area at a time.

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Can you imagine if you went through and just like took everything out of every closet in your house? Like, I just, oh, I just got overly-whelmed stressed thinking about that for you and for I.

It's also kind of like purging, right? I mean, at the end of the day, it's like you're taking everything out, you're looking at it, and you're like, let me just get rid of what I'm not going to keep, right? Some people call it purging. Within The Home Edit, they call it the edit stage.

So you do go through your items and you determine, what do you need? What do you not need? I actually think this is a great process in business, too, a little bit bigger than just referrals.

But because I think when you kind of go through, whether you're doing it in a closet in your house or you're doing it in a kitchen drawer, or your entire kitchen, right? I think when you go through and get rid of the stuff that you don't need, it's also, it feels good.

Like, it can feel very freeing to let go of stuff. I mean, one time I went through, and I did this in the drawers in our kitchen and we had like seven spatulas. I mean, what household, when it only has one human in it who cooks, which is my husband, Norm. Like, why does he need seven spatulas?

So I edited our spatulas and turns out I got rid of his favorite one. So I don't do that anymore without talking to him first. He was very upset about that one spatula. Again, I can say all this because we all know he does not listen to the podcast.

So anyway, this is all about, with The Home Edit process, this is all about reclaiming that sense of control. Like, okay, right, you feel efficient, you feel competent, you know what you have, and you're editing things and you're putting them in light groups.

Alright, so now let's turn that to business from a referral application of how you use the edit stage with your referrals. And what I'm going to do is I'm



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going to go a little bit higher in terms of like taking you from, if referrals is that 10,000 foot view in your business, I want to take you up to the 30,000 foot view.

And I think the first thing you should do when you are doing the edit from a referrals perspective is go a little bit bigger and think about your business development actions or activities or maybe you call them your sales activities in general.

Like just go a little bit bigger and let's take everything out of the quote-unquote closet, right? Let's take everything out that you're doing that is your actions to produce clients.

So these are the actions or activities, the strategies, the tactics, the whatever you call them, that you do on an ongoing basis, whether it's daily, weekly, monthly, couple times a year, whatever it is, these are the strategies that you do that get prospects into your funnel, that make them aware of you and then decide, hey, maybe I do want to consider hiring you. So this is like that 30,000 foot view.

We want to look at everything you're doing and referrals, I hope with my fingers crossed right now that you cannot see, I hope referrals are a part of what you're going to take out of that metaphorical closet right now, that there is something you're doing to try to generate referrals as one source, one way to get prospects into your prospect pipeline so that you have the opportunity to take them through the buyer's journey, which is aka your sales process, to get them to say yes at the end to working with you.

But referrals, I'm hoping, is just one of those sources that you're taking out, as I said, as that metaphorical closet. But you're probably doing other things. Right? Maybe you are in networking groups. Maybe you belong to associations and organizations.

Maybe you do direct mail pieces. Maybe you do signage. Maybe you do ads. Maybe you do an email campaign. Maybe on your website you promote free content, like someone can download a worksheet or a cheat

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sheet or an e-book that puts them on your email list, that gets their contact information for you to follow up.

Maybe they're getting referred to you. Yes, that's what I'm hoping you're gonna say. I hope you're nodding your head right now. Yep, that referrals, that'll be a peace of mind. But all the different ways that prospects end up in your universe, trying to decide, am I going to hire you? So I want you to go bigger.

But as we're editing this, I want you to be paying attention as we're grouping like items together. They kind of fall into three buckets. Those three buckets are what do you do that's prospecting, what do you do that's marketing, and what do you do that's referral based.

And they're all valuable, right? They're all very valuable. So if you have a content marketing strategy that's mixed in with your social media strategy, that's one of your marketing strategies. That's valuable.

If you have a networking strategy of how you are meeting people through networking, I hope that it's strategic and you have a purpose behind it. But if networking is something that you're doing, that's part of your prospecting activities. Or if you are running ads, that's part of your marketing strategy.

If you are cold calling, Lord, I hope you're not cold calling or cold emailing or buying leads, but maybe you are. That's part of your prospecting strategy.

So when you're pulling them out of the metaphorical closet, all the activities that you do to generate new clients to get prospects into your business so they can become potentially new clients, I want you to pull them all out. Which basically just means write them down. Like, what are all the things we're doing?

If you have a team, do this with your team that's responsible for the rainmaking within your company, within your business, those who are responsible for bringing in leads, prospects, right?

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And so I want you to look at all the things that you're doing, and I want you to group them then by this is prospecting, this is marketing, and this is referrals. And please do not believe the myth that referrals are part of your marketing. There is no such thing as referral marketing. I don't care how many times people say it.

Referrals and marketing are separate, and you have to think about them separately, which is very, very important when you're thinking about the activities that you will do to be able to generate referrals. It is not marketing.

So you're going to pull out the actions you're taking, the activities you're doing, the strategies that you are deploying, and you're going to put them in their buckets. And that's how we're doing our edit.

And I think it's really, really important as we're grouping those like items together, pay attention to what's working and what's not working. From specifically a referral perspective, I need you to understand your metrics.

Do you receive referrals, what I would call real referrals, not those things that people think are referrals that aren't, right? But like, do you receive referrals? How many are you averaging in a year? How many have you gotten so far this year? How many did you get last year? What about the year before?

What's your yearly average of referrals that you can kind of expect without doing anything different in your business, which is just based on historically what you've done over the last couple of years?

It's basically understanding where your clients and your prospects are coming from and what are the actions and activities you're doing that are actually working.

So if you look back at where your clients are coming from, that informs usually where you should be spending your time and energy in bringing in more prospects to turn into clients.

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So remember, we're in the edit stage here. We are taking the business development, the sales strategies that we do out of the metaphorical closet. We're grouping like items together. We've got some prospecting things. We've got some marketing things. We've got some referral things.

We're grouping like items together. And we're also paying attention to our metrics about what's working and what's not working. And the best way to do that is by figuring out, well, where are your clients coming from?

Like, are they coming from LinkedIn or are they coming from referrals? Are they coming because you go on podcast episodes, and you are guesting on other people's podcast episodes? Are they coming because you belong to a couple of really strong networking groups?

Like, where are your clients coming from? And usually it's not one, it could be a couple, right? I'm hoping you're going to say, I get referrals and then here's two or three other ways that I bring clients into my business.

So as you start doing this, here's what I want you to resist. Resist the urge to make decisions on what stays and what goes in terms of completely stopping something. Like I know in the home edit process, in the editing stage, you're supposed to get rid of what you don't want.

Right now, I just want you paying attention to what is working and what's not working and what are the metrics behind that? What are the metrics behind all the different things that you're doing in your business?

And certainly, when you realize, hey, wait, I am getting referrals and these are the people who've referred me in the last couple of months or in the last year or the last two, don't like start trying to come up with that stuff in your head and thinking about what you'll do. That's going to come later. Don't worry. We'll get there.

But really this is about laying it all out, figuring out what it is, figuring out what's working so you can actually start that purging process. Do not purge

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until you actually know the metrics behind it. So do not get rid of something unless you know the metrics behind it.

Because lots of times I find that people, they think something, and the reality is the data reveals something different in their business.

Okay, so the second step in the home edit process is the categorizing. So once you've determined what items you're keeping, it's time to divide those items into categories or what they call our zones, right?

So let's just use this as an example from a pantry perspective. You're gonna wanna make sure that when you're doing your pantry, that you're thinking through, where am I going to label things, categorize, put things so that it maintains like long-term organization.

So if I'm going to put all the pasta together, that would make sense, right? Because pasta would be together.

It's also a good reminder that categories you create should be inclusive enough that you can figure out exactly what they are without having to ask too many questions. So It's like, don't make your categories so, so minutiae that you're like, I don't even remember what goes in there anymore. Let's definitely not do that.

So in this case for categorizing, now I want to just dive into it from a referral perspective. I want to apply specifically this step to the referral perspective. So I want you to look a little deeper.

So the referral application for the categorized step is I want you to know in black and white, because you have it written down, who is referring you. Like who are the people who have referred you to your clients over the last three years?

Who do you want referring you? I want a list. Start writing down their names or start writing down what they have in common, right? You may not

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know names of the people you want referring you, but you may know, hey, someone who's like a business coach is a great referral source for me.

So write down either the people you want referring you or maybe the roles that they have that have the opportunity to refer to you. So start paying attention to who is referring you, so figuring out where your clients come from, that's a really good place to start with who's actually referring you, if any of your clients were referred to you.

And of course, not all clients are referred, but also not all prospects become clients. So sometimes you've got to look back at not only your clients, where they come from, but also the prospects who didn't become clients. Where did they come from?

Then we want to look at who do you want to refer you. So start making that list of the people that you wish were referring you. Could be clients, could be centers of influence. It may be someone from within an organization, or it may be what people have in common, some commonalities of what you think great referral sources would look like for you.

And then I want you to also go a little deeper and start figuring out what are you doing within your client experience that makes you referable?

And that's done in two ways, right? It's like, what are you doing that kind of creates that wow experience? That I didn't expect that from my CPA, if you're a CPA. I didn't expect that from my real estate agent, if you're a realtor. Like, I want you to think like, what are you doing in your client experience that kind of creates that wow experience?

And then do you know how to plant referral seeds throughout your client experience, so the idea of referral starts percolating within your clients? I just want you looking at what you are doing and maybe where you have some gaps.

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Because for categorizing in this step, as it relates to referrals, is all about digging in a little bit deeper and paying attention to, OK, what's actually going on?

And let's put some real names and pen to paper on behind what's actually happening in our business with who's referring you, who do you want to refer you, and what's going on in your client experience, and can you improve that? And looking at that in those three categories.

Existing referral sources is who's referring you, potential referral sources, or who do you want to be referring you, and referable client experience, that's what's going on within your client experience to actually generate referrals for each client that's going through your repeatable client experience.

It doesn't mean every client will refer, but it means you're putting it out there for the best case that they will ultimately refer.

Okay, so that's step one was edit. Step two is categorize. We have two more steps to go. So let's move on to step number three.

**Stacey Brown Randall:** Hey there, pardon the interruption. If you're a longtime listener to this podcast, then you've heard me mention my coaching program, which we call Building a Referable Business, or BRB for short.

But did you know the coaching program is only one of the three ways that you can work with me? If you're just getting started, or you're not really quite sure how referrals are gonna look in your business, so you're dipping your toe in, then you should check out my starter course. It's called Your Next 5 Referrals.

Or if you have a small team and you want me to build your strategy for you and show up and show your team how to deploy it and implement it, then my VIP Referrals in a Day experience is right for you.

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You can find links to all three ways to work with me, so you can check them out, Your Next 5 Referrals, the BRB Coaching Program, and the VIP experience in the show notes page for this episode. Now, let's get back to the episode.

**Stacey Brown Randall:** Alright, step number three is contain. Now that the editing and categorizing step is complete, it's time to contain them.

Within the home edit process, containing is really crucial, and they always talk about this, because it gives your items a place to go so that you actually have an easier time going to the fourth step, which is maintain.

Now, something big that the home edit is a part of is they like to take advantage of vertical space by stacking items up. Which means you're gonna see, if you've ever watched The Home Edit, they are huge into their acrylic bins because they are see-through.

So they do a lot with acrylic bins that are clear so you can see through them and then also ones that stack, so you're taking advantage of the vertical space, you're stacking things up and then of course everything is labeled.

And so you're labeling, like, these are pens. These are, you know, extra staples. Like, everything's getting labeled. Everything goes into a bin. And you take advantage of that vertical space, like using our example of a closet, to stack things on top of each other.

Okay. So how do we use the contain step within our referral application? Contain is how we put our referral strategies and tactics into place.

So remember how I said The Home Edit's really big into their acrylic bins, right? Because you can see in them quickly and you can make sure that you know, oh, that's pens that are in there, right?

It's the same thing with the referral application. They're acrylic bins, in my opinion. Again, metaphorical. You're not putting anything referral-related

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into your referral bins. I don't know how that would work. But what I like about the idea of acrylic bins is that you can see in them quickly, which means it keeps, from a referral perspective, your process in view.

The worst thing you can do is build it and then put it into a digital shelf and forget all about it. Like you need one place where you're containing everything that is referral specific.

For my clients in my BRB coaching program or in my VIP Experience, there is a master dashboard, fancy term for a spreadsheet, that sits in a Google Drive folder that the client and myself have access to. And we have one spreadsheet with a bunch of tabs.

It's not really as nearly as fun and sexy as those acrylic boxes that you can use for actual organizing. But it means the tabs keep us like, OK, there are a couple of tabs here are our metrics, are our tracking, right? And then these tabs are based on our existing referral sources and what we do to take care of them.

And then the next couple of tabs are based on our potential referral sources and our process to cultivate new people to start referring us, right? So we use tabs for everything, because it keeps everything labeled and it keeps it in view.

And then when people start understanding those tabs dictate the who and the what you're doing, that's when things start clicking for them. They're like, I got it. I got it. I know what I'm doing, and I know where I go to find it.

So keep the process in view. It's why I like a spreadsheet in this case that I have access to, and my clients have access to with the tabs at the bottom that keep us focused on the who and the what we're doing for the who. That's just a really big part of referrals from that perspective.

So that spreadsheet is not fitting in some kind of clear box. I recognize that. But when it's in a dashboard that you then open up, that's the other thing you actually got to go into and open it up to update it.

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And I try to encourage that because the very first tab is always our tracker tab. And that should be updated monthly, if not every time you receive a referral. And then, of course, the other thing that The Home Edit talks about within the contain step is labeling everything, like labeling everything by zones.

And that's the same thing for me. When I tell folks, OK, think about what you're going to do by first thinking about who you are doing it for. So when someone tells me, OK, it is time for me to do an outreach, a touchpoint, I'm going to do this touchpoint.

And then they go in their heads, oh, wait, can I do that for clients? Can I do that for my referral sources? Can I do that for my potential referral sources? Can I do that for prospects? And then they start to apply one touchpoint that we've talked about, and they start to apply it to a whole bunch of people.

And I always say, no, no, no, wait. Who are we doing this for first? That then dictates what you're going to do. And then it gives you great clarity, right? So that's how we contain things.

So we focus on when we're thinking about what we're going to do to generate referrals, that outreach, that tactic, that strategy, we think about who we are doing it for first, and that informs everything about how we are able to manage that process.

Okay, and then the fourth and final step in The Home Edit process and philosophy is all about maintain. Because from what I understand, The Home Edit philosophy is more, is about more than just organizing a space. They are creating an organizing system that users will be able to maintain.

Like my closet, everything's organized by color. Maintenance is a big part of the organizing process because maintenance is only possible when the rest of the system is in place.

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If you have edited out items you don't love, categorize them thoughtfully, and really contain the products that make sense for your space in a way that makes sense, then you'll be able to maintain it.

It's like if the box says pens go here, why are you putting the scissors in there? It doesn't say scissors go in there, right? So the maintaining process works best when the system you've set up supports your ability for maintaining to be easy. And easy is what we want, right?

Now, here's my referral application for this. Let's be honest. Maintaining anything is easy once you start seeing results. But here's the kicker. You have to maintain that new process to give results time to show up.

So when I think about maintaining my process so that I can have the results I want, I know once I start seeing it happen, I'm like, yeah, let's do this. This is fun. Of course, I'll do whatever task I'm supposed to do. But you have to give maintaining, doing the process, time so the results can show up.

So a lot of ways that I use maintaining and that I teach my clients to use maintaining. And this is just a little tip for you guys to consider as well. Once you have a strategy or a process in place, the way I'm going to use, and again, I teach a lot of different types of strategies.

Some of them are situational. Like, you know, I only use this strategy when this is happening. Like, this is my process for when I receive a referral. And yes, it does go way beyond the thank you note, right? But this is the process I follow when I receive a referral.

Well, you're not doing that process if you haven't received a referral today. So we think about things in terms of what the strategy or the tactic is needing from us. But I really like using automated reminders for next steps.

Any time in my business, I can set up a next step through an automated reminder, whether that's going to come through the database that I use can send automated reminders. My assistant can send me, which are not

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automated to her, but they're automated to me, can send me automated reminders.

And then, of course, I can set that up within my task list, within my calendar, right? There's lots of different ways you can use technology to set up automated reminders to remind you of the next step. And that's really, really important so you can't forget it.

And then sometimes, and you can't use automated next steps for everything, right? I'm thinking about what I teach my clients, and we use them within particular referral strategies more than anything.

But for situational strategies, I really love using if-then rules. If this happens, then these are the things we do. And if any of that can be automated, great. And if any of that has to go on someone's task list for someone to manually do, great.

But that is how we maintain it, so that we don't have referrals start showing up, and we're like, wait, I got three referrals last week. Did I write a thank you note?

That question doesn't ever have to come up, because you're using strategies and systems automated as much as you can, or just a process that you follow, even if you have to do it manually, that tells you the next step.

Because that is how you maintain all the strategies you're gonna put in place that I'm gonna want you to have in place when it comes to referrals.

Alright, so that is the four steps of The Home Edit process to organizing as applied to referrals. Those four steps, again, are number one, edit, number two, categorize, number three, contain, and number four, maintain.

So I hope you enjoyed this episode. Of course, we talked a lot about The Home Edit, so we will link to The Home Edit in the resource page. And if you want to go back and listen to that episode 57 where I talk about the six

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ways to Marie Kondo your referrals, way back in the day when I was like a baby doing podcasting, go check that out. I wonder if I'll sound different.

But you can find all these links on the show notes page for this episode at [StaceyBrownRandall.com/328](https://StaceyBrownRandall.com/328). And don't forget, Stacey has an E.

We're back with another great episode next week, created with you and your needs in mind. Until then, you know what to do, my friend. Take control of your referrals and build a referable business. Bye for now.