

Ep #333: Saving Time with Referrals



Full Episode Transcript

With Your Host

Stacey Brown Randall

Stacey Brown Randall: Have you ever considered all the different return on investments you can get when you decide to invest in referrals? Let's talk about it.

Roadmap to Referrals with Stacey Brown Randall

Ep #333: Saving Time with Referrals

Hey there, and welcome to episode 333 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 11 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.

Please join me in welcoming Melanie Shaffer to our podcast. Melanie is the CEO and co-founder of Talent Suite, an HR consultancy that helps businesses unlock their people's performance. Melanie is also a member of my Building a Referable Business (BRB) coaching program. And it is so fun every time I get to talk to her.

I love the fact that in my programs, I work with my clients for a year. Because in that amount of time versus, you know, something that's just like online, and you never really talk to them, or maybe it's something that's just for a week or two or a month or two, when you work with somebody for a year, you just, you get to know them. And it's great.

And not just the business side of them, you get to know the personal side of them, which is always so fun for me. And then when I'm in certain areas where I have clients, I always try to reach out so we can get together and meet in person, which I have had the pleasure to be able to do with Melanie.

So Melanie is going to talk to us today about really understanding mindset shifts that she went through from a referral perspective as it relates really to her business and the referrals they were already receiving.

So, a lot of times when I have my clients on this podcast, they have really cool numbers to share, or really cool results to share. It's like this, you know, they doubled, or they tripled the number of referrals that they received.

Roadmap to Referrals with Stacey Brown Randall

Ep #333: Saving Time with Referrals

Or they 3x'd or 4x'd their revenue from referrals in one year, or they closed their biggest client ever because they received a referral. And those are fun, and we will definitely have more of those coming up here on the Roadmap to Referrals podcast.

But I specifically wanted Melanie to come on the podcast to talk today about just a different perspective on ROI within working with me, and within my referrals without asking methodology, and specifically what she's seen with the coaching program.

And a big part of that ROI you'll hear her talk about is actually that saving time, which for me is just as powerful and important as it is actually receiving more referrals because you're not getting enough or being able to at least increase your referrals as well.

And so Melanie is going to talk about the things that she has going on in business and what that looks like for her and how having a structured process behind what she does when it comes to referrals has really been the game changer for her to actually save her time, and they can keep getting the results that they're getting.

So that is just a different perspective of ROI for those of you that are interested in hearing another business owner talk about that. She's also going to talk about something we talked about recently on the podcast.

Obviously, we have had an episode that was back in [episode 332](#). So just last week's episode, we did an episode on upstream versus downstream referrals. So we will link to that in the show notes page for this episode.

And the show notes page for this episode is StaceyBrownRandall.com/333. That's for episode 333, and Stacey has an E. But we will link to last week's episode, episode 332, where we talked about upstream versus downstream referrals because Melanie and I actually mentioned it as part of our conversation too. So without further ado, let's talk to Melanie.

Ep #333: Saving Time with Referrals

Stacey Brown Randall: Melanie, I am so excited to be chatting with you and having you on the podcast. Thank you so much for being here.

Melanie Shaffer: Thanks for having me.

Stacey Brown Randall: So, OK, I did the official intro, of course, but why don't you tell everyone listening just a little bit about the work that you guys do and who you ultimately are helping?

Melanie Shaffer: Yeah, so we work with mid-market executives who we say are time-starved and growth-minded that have reached a pivot point in their business that they need help with people strategy.

So oftentimes it's coming in and looking at hiring processes, how they're developing leaders, and then their culture. So we come in and take a holistic view of how to move them to the next stage.

Stacey Brown Randall: Yeah. And then you guys provide, like tools for them to use as well. It's not just like, Hey, here's some consulting. It's like, here are the tools that are going to keep serving you, which I think that's a really cool part of your business too.

Melanie Shaffer: Yeah, that's a great point. So one of the things that we do with the tool we have is called the predictive index and it is a talent optimization platform that underpins all of what we're doing so it becomes sustainable and not just kept up at the C-suite, but disseminated through the middle level of management, which is where companies typically break, is in the middle.

Stacey Brown Randall: Yes, those poor middle managers.

Melanie Shaffer: They have a hard job.

Stacey Brown Randall: This is why I own my own business, and I don't sit in middle management somewhere.

Melanie Shaffer: Yeah, I've been there too.

Roadmap to Referrals with Stacey Brown Randall

Ep #333: Saving Time with Referrals

Stacey Brown Randall: Yes, absolutely. OK, cool. So you have been in the Building a Referable Business coaching program. We're not quite at a year. So by the time that this podcast episode goes live, you won't have hit your year mark. You're still a couple of months out from that.

But before we kind of dive in on what BRB and the referral strategies that I teach have meant for your business, why don't you talk a little bit about the work that you do as it relates to why referrals are so important for being able to connect with potential new clients.

Melanie Shaffer: Sure. So typically, the initial conversation that we're having is with the CEO of a mid-market company sized between, and I'm going to go employees because that's where we come in with the level of complexity in the business.

Typically, when they hit about 50 employees up through kind of 500 employees, is that range where they're growing rapidly and they know they need help doing something differently as it pertains to hiring, developing, and retaining their people.

And you don't get access to a CEO through cold calls, or I heard you're great at this I wanted to have this conversation. You get those conversations and the audience with them through typically a trusted source they're already working with.

So, for example, those CEOs are in peer groups and there is a chair that runs those groups. And so we get a lot of referrals from them.

Strategy consultants often are working with the C-suite team around how you disseminate and communicate that strategy down to that middle level so that people are clear on the execution of how to get to results.

So those are our typical kind of referral partners that see issues with people, and then the CEO is motivated to have that conversation to solve that issue.

Ep #333: Saving Time with Referrals

Stacey Brown Randall: Yeah, I think that's really important, the identification. And I just recently did a podcast episode about this. I'm not going to force myself to remember the exact number of the episode, so I'll just link to it in the show notes page for this episode, for those of you listening. But I just did an episode on understanding the referral sources that swim upstream versus downstream from you.

And I think Melanie, what you just did is like laid it out very perfectly in terms of these are the types of referral sources for your business. Typically, not only, but typically that swim upstream from you, meaning they're having conversations with the CEOs long before you would ever be a part of the picture.

And they're identifying, hey, you've got these problems, and we need to figure out how to help you to solve them. And that being strategy consultants and it being folks that run CEO-type peer groups.

And so I think identifying, that's a big part, right? Like we always talk about this inside BRB, is that this isn't like a spray and pray model in terms of let's just see who we can get referrals from. Let's just try everybody. No, that's a recipe for a waste of time.

And so we want to make sure we're getting really clear on who's having these conversations with our potential clients before we're ever on their radar that can uncover these problems and then be able to refer those potential clients to us.

And I love how crystal clear you are with that because it's really important. In some cases, with folks that I'm working with, it takes a while for them to get to like, not only, it doesn't take a while to identify who are their best referral sources, but their willingness to go all in into those folks and say, these are my couple of groups of people who are best served to refer to us.

And of course, we're not talking about your clients in this case, but they exist too. Obviously, you get referrals from clients as well. So I always just

Ep #333: Saving Time with Referrals

like to set that aside. Clients, yes, their strategies around referrals from them, but let's also make sure we know who swims upstream from us.

So I love how crystal clear you made that. That's probably gonna help somebody listening be like, okay, that answer was very clear to know who should be referring to me. And I'm assuming, as you narrowed in on this is who should be referring to us. This is where those people hang out. This is how we're getting in front of those people.

I know one of the things you talk about within BRB, it's a little bit, I think, it's the ROI that I don't think people talk about that much. But it's there. I feel like every time we talk about ROI on any type of investment, but in this case, in the coaching program, most of the time we're talking about how many referrals, and then how many more referrals, and then revenue from those referrals.

But I love your approach to looking at this from a time-saving perspective. So I think that kind of goes hand in hand with you being very laser-focused on who refers to you, but talk a little bit about how working within the coaching program has helped you get to that place of being like, okay, this is how I'm saving time with my referral strategies as well.

Stacey Brown Randall: Hey there, pardon the interruption. Want to know how to work with me? Get started with the basics of referrals with my starter online course called Your Next Five Referrals.

Want to learn all of my referral strategies with access to me as you build and implement them? Then apply to join my Building a Referable Business coaching program. This is the coaching program that Melanie is a member of.

Have a small team and want me to build your referral strategy for you and your team, and then have me onsite for two days as we put everything in place? Then apply for my VIP Referrals in a Day experience.

Roadmap to Referrals with Stacey Brown Randall

Ep #333: Saving Time with Referrals

Link to all three ways to work with me can be found on the show notes page for this episode. And of course now, let's get back to the episode.

Melanie Shaffer: Okay. So I think before I did the program, First of all, it did take me a little while to figure out who the right partners are as referral sources, because some of the ones that seem like you're most drawn to and you have commonalities, maybe the types of clients they will work with don't align with who you want to work with.

So that did take time. I'm going to say if people are listening. It took a couple of years. So don't feel bad if you're in that stage, OK?

But as far as what the program has done is I already, gosh, I think we were five-and-a-half years in to knowing kind of who we are and having cultivated those sources, and I really needed a better way to stay in front of the sources. And have an organized way to add a few new ones at a time, because my role is not just business development. I own the business.

So what your program did was gave me a structure to really start categorizing the sources that have referred to us because I was spending a lot of my time chasing the new ones. And it felt overwhelming because I wasn't organized about how I was following up with them.

And instead of that, it took me to a mindset of let's first really hone in on the ones that have created the most value. And then let's have really intentional structured touch points that keep you front of mind that aren't exhausting or don't feel disingenuous or not asking for something. So I absolutely love that now I have that in one place.

It also brought more activities that I'm doing with the referral sources that I actually enjoy that now are business development, but they don't feel like it.

So I love the touch points of the gift being something small that you can even just send out to the people we've identified as those most important referral sources. And some of them even tagging me on LinkedIn when they open it. And it's, you know, something as simple as a note in the

Roadmap to Referrals with Stacey Brown Randall

Ep #333: Saving Time with Referrals

summer with a tea bag and instructions on how to make an iced tea in Texas.

So I love that kind of thing. And I would have never associated that with business development in the past. So I think it's just, first of all, given me more intentionality and structure and clarity of how to stay in front of those people.

It's given me activities to do that don't feel creepy, slimy, what's in it for me. And then it's given me the structure to have the intentional ones I'm cultivating and a way to even opt them out if we aren't gelling or I'm not seeing this energy and not feeling bad about it, you know?

Like, before I would have felt like, oh, I have to kind of keep meeting with this person, even though I kind of know that they're probably not going to refer me. And I'm very big on referring back too.

Stacey Brown Randall: Yeah, I think that we come in to, I find with most people when they come into the coaching program, they come in with all these I should be doing, I need to be doing, I'm supposed to be doing, right?

There's all these things, that this baggage that people bring to the table. Because there hasn't been this structured approach and understanding exactly what should be happening with your referral sources.

And then when they start identifying their existing referral sources and building out the touchpoint plan and then identifying their potential referral sources and building out their running five, keeping warm, then they realize, oh, wait, there's structure behind this. There's a reason and an objective behind this.

And yes, we come at everything from a place of gratitude and thankfulness. Like we should take care of the people that are referring to us. Like that makes business sense. Right? So we come at it from that place and then it

Roadmap to Referrals with Stacey Brown Randall

Ep #333: Saving Time with Referrals

gives us that structure to be able to say, but that doesn't mean everybody fits. And that's okay.

In some cases, it is, it's like giving permission for people to be like, you don't have to keep cultivating that relationship. That doesn't mean you don't love that person. That doesn't mean that person's not amazing. It just means you don't have to keep cultivating them. And I think people get really stuck in that place of like, but I feel like I should.

And so when we kind of see it right from that perspective. I think it's, you know, sometimes I spend time feeling like I'm just helping people remember how to be a good person, and then giving them permission to do the things they kind of already know they need to do but giving it to them in a way that they don't feel like they're going to miss out on something.

Because now we have this structure and this platform and this procedure kind of behind it, which I think has been great to kind of see that you run with. And obviously, I know how busy you are.

And you travel around to do a lot of speaking engagements, so folks, if you're listening and you ever want someone to come in and speak to your organization about Melanie's area of expertise, her sweet spot. She's a fabulous presenter. But you also travel a lot.

You're a mom, you're a wife, like you've got a lot of stuff going on in addition to just being the business owner as well. So I love it when you're like, it's saving me time while having the intended positive results that we are looking for as well. Which is really great.

And I think something that sometimes people overlook is that ROI on time saved, obviously when it's working, is as valuable as any other result that we can get.

And I want to go back and talk about the tea bag example that you gave. So that was one of Melanie's touch points and it's so funny because you're like how to make tea in Texas, which is that's how that touch point worked.

Roadmap to Referrals with Stacey Brown Randall

Ep #333: Saving Time with Referrals

Now, if people are like, I don't get it, you kinda have to be in the program, I think, for how we build out the outreach, what we call touch points. But the outreach that we do for our existing referral sources, and in some cases, potential referral sources, not everybody is sending out a teabag. Like this was Melody's specific touch point.

And it made me think about when you said like how to make tea in Texas. I was like, if I did that, how to make tea in the South, I'd be like, forget the tea and just dump in a whole bunch of sugar.

Melanie Shaffer: Sugar. Yep. That's true.

Stacey Brown Randall: That's all we need. That's all. Here's how you make tea.

Melanie Shaffer: It's the little sugar packets.

Stacey Brown Randall: And you need like 1000 of them. I mean, yes, totally. Oh gosh, that's so funny.

Yeah, so I love the fact that when people are customizing their outreach to their referral sources, we focus on letting their personality shine through. And what I love is that you made that connection too.

And then it doesn't really feel like business development. It doesn't really feel like I'm trying to do that business development work. It just kind of feels fun and good. And definitely, I think, as you kind of think through all the things you could be doing for business development, this is definitely, I'm assuming you would say, a better way to go about doing it.

Melanie Shaffer: Oh, my goodness. Yeah, a lot more fun. And I get to involve my team in it, because we come up with ideas for these touch points.

And we're having our first client appreciation event as a result of this program next week. And we're focusing it on gratitude. So it really kind of ties a bow on what we've been doing throughout the year.

Roadmap to Referrals with Stacey Brown Randall

Ep #333: Saving Time with Referrals

And we've gotten a great response of people that are excited to come and learn what we mean by that. And be in community with other like-minded folks that are thinking, going into the holidays, about how can I better express gratitude?

Stacey Brown Randall: Yeah, that's perfect. I can't wait to hear how that event goes.

Okay, so what is one thing that you would say that was like an aha moment that you had when you joined the coaching program and you kind of learned the different ways that we generate referrals? What was either like an aha moment that you had or something that surprised you that you didn't anticipate?

Melanie Shaffer: Hmm, I mean, I think, I don't know that I have like an aha. I think it was more, oh, there actually is a way that you can put structure around what has felt like nebulosity. So that's probably not, that's why I'm like, it's not an aha, but it is an aha. It's not an in the moment, it took time.

Because the steps you take in the beginning, maybe my aha was, I didn't realize how disorganized I was, okay? So like, I had to put the list together and cull it down, and I was like, oh my gosh, like this is daunting, right?

So my aha was, I guess that I was wasting a lot of time on a lot of energy and effort that probably wasn't in the right places. Maybe that was my biggest aha.

Stacey Brown Randall: Yeah. I mean, I think it's different for everybody. And some people have like little, tiny ahas throughout. Some people kind of have like that first big one, you know, like, oh my gosh.

And, you know, for some folks, it's just the willingness to think about referrals differently. Like, wait, I can get these without asking for them? I have to do other stuff, right? I can't just like, you know, cross my fingers

Roadmap to Referrals with Stacey Brown Randall

Ep #333: Saving Time with Referrals

and wish that they're going to show up, but I can do other stuff. But like, you know, thinking about referrals differently.

And then for other folks, it is like, hey, we have good stuff happening, but to that point, we're not as organized or streamlined as we need to be so that we can, you know, save time and have the same kind of results.

So, okay, so let me wrap up by asking you this final question. When you think about the coaching program and BRB, if you were having a conversation with someone about the coaching program and joining, what would you say to them as to like, hey, just jump off the fence, go all in and join the coaching program?

Melanie Shaffer: So, well, you know, I have two people that have joined your program directly as a result of me saying these things, but it would be in conversation with someone that is a services provider that shares with me that they are kind of overwhelmed with their business development activities or the energy they're putting in is not yielding enough return.

I have said, you need to work with Stacey Brown Randall in her program because she gives you a way to make this so much less with so much less friction and with efficiency and clarity. And for the right people that I run in circles with, those are the people that immediately reached out to you.

Both the people that you have worked with because of my sharing that with them, it was one time. I said this one time to them and they're like, I got to work with her.

Stacey Brown Randall: Yes. They're like, let me join.

Melanie Shaffer: Because people know, I am all about maximizing everything I do. So if I recommend something because it created utility and efficiency and maximization for me, they're like, oh, well, then I'm going to do it.

Ep #333: Saving Time with Referrals

Stacey Brown Randall: Oh, my gosh, I love that. Yes. And Jonathan and Mindy have been amazing to work with as well. Yes, I do appreciate that. Not only are you a client, but you are also a hundred percent ratio of referred prospect to client for me as well. A hundred percent.

Melanie Shaffer: Girl, I told you I'm a reciprocator. That's where my relationships, I want to only have relationships where I can also provide a source of revenue for them. That makes my heart so happy to know that if you're helping me learn something that increases my capacity, I want to do the same for you.

Stacey Brown Randall: Well, I appreciate it. I very much appreciate it, of course. And I love that that's your heart. And I love that that's the place that you come from.

You know, there is something to be said for the people that I help and the people that ultimately end up having success. Not only do they have to do the work, right? The stuff is not like just like you don't push a button and things just appear, right?

So not only do you have to do the work, but you also have to come at this from the right place, from a heart place of feeling like I want to take care of the people, right? I want to take care of the people who take care of my business, and I want to cultivate and help other people first before I expect something to come back my way. I think that's really, really important and kind of goes to the mindset of how all this works.

So, okay, perfect. Well, Melanie, I thank you so much for spending time with me today and being on the podcast. I really appreciate it.

Melanie Shaffer: You're welcome. Thanks for asking.

Stacey Brown Randall: I hope you enjoyed this conversation with Melanie as much as I enjoyed having it with her.

Roadmap to Referrals with Stacey Brown Randall

Ep #333: Saving Time with Referrals

I always think when I can bring my clients on the podcast and you can hear from them that they're real people, that they own real businesses, that they are doing great things and also still struggling with some things, always helps all of us when we are thinking about this from our business's perspective.

I think when you think about the type of client that Melanie talks to, we're talking about CEOs of middle market companies in that 50-employee range up to that 500-employee range and figuring out how to help their middle managers, that middle level of managers in those businesses succeed from a performance perspective and a culture perspective.

I think it's just a different, right, it's a different type of environment, but still an environment that needs referrals to be successful.

So I hope you guys enjoyed this conversation with Melanie as much as I did. Of course, remember, we are going to have links to everything that we mentioned in the show notes page for this episode, including how to connect with Melanie if you want to check her out.

Maybe you need her. That would be amazing if you actually heard her on this podcast and was like, I actually have a problem that I need her to help me solve. Please reach out to her.

You will find her contact details to be able to reach out to Melanie on the show notes page for this episode, which can be found at StaceyBrownRandall.com/333.

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