

Ep #334: Q4 Referral Plan (Step 2)

ROADMAP
to
REFERRALS



Full Episode Transcript

With Your Host

Stacey Brown Randall

Stacey Brown Randall: Let's continue our methodical approach to how you'll end the year with your referrals over the next 90 days.

Roadmap to Referrals with Stacey Brown Randall

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Hey there, and welcome to episode 334 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.

Real quick, before we dive into this episode, I just want to let you know that if you are an attorney or you are a real estate agent listening to this episode, this is your final chance today to join our attorney-only cohort and our realtor-only cohort.

So if you want to make sure that you end the year strong and start the year with a focus on getting referrals in place and ready to go, you need to consider joining the Building a Referable Business cohort, which is only for six months.

And it's focused on one group right now, just attorneys, and another group, just real estate agents. Go to the show notes page for this episode, and there will be links to each of the information pages. So if you're an attorney, you're going to click on the attorney link. And if you're a real estate agent, well, you're going to click on the realtor link.

Just go to StaceyBrownRandall.com/334. That again is StaceyBrownRandall.com/334. Stacey has an E, and of course, 334 is 334. So please check that out while you can.

In [episode 329](#), which was released on the first Tuesday in October, we started the first part of this 90-day planning or this 90-day action. The October episode, 329, was all about walking you through what to prep.

So the way I broke down this 90-day plan is we're taking the first episode of October, November, and December, and I'm just walking you through the

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things I want you to do that will allow you to end this year in just a little bit of a better place, maybe than where you started it when it comes to referrals, and give you a better foundation and starting point for the beginning of the new year.

So when you think about this 90-day plan, it's basically just these three episodes. You can come back to them year after year. And really just, it's like, hey, these are the things to focus on as we're getting ourselves ready.

So the October episode was all about walking you through the prep, right? So in this episode, the November episode, you're going to start taking action. And then there will be more action for you to take with the December episode that will come out the first Tuesday in December. And it'll also have some planning for 2025 mixed into that as well.

Alright, so the first thing I'm going to do is give you a quick recap of what I asked you to prep for me in October. So I'm just gonna run through these six points that I asked for you to like pull together, pull a list of, do some work, right? This was the prepping that you did. And then I'm gonna walk through each of these six things and then tell you what to do with them for this episode.

So real quick, number one, I asked you to identify by name all of your referral sources from this year and the two previous years. So identify by name all of your referral sources from this year, 2024, last year, 2023, year before, 2022, and basically wanting to know who your referral sources are based on who they referred, if they became a client, or if they did not.

So in episode 329, I talked about how to reverse engineer this information. I talk about it a lot, how to uncover who your real, true referral sources are by looking back at where your clients and your prospects came from.

So you can go back to [episode 329](#), and it will walk you through that reverse engineering process. So you should have now a list of your referral sources from the last three years, right, from 2024, 2023, and 2022, and you'll have a little bit more detail in them. You'll have not only who are your

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referral sources, but also who they referred, whether that person became a client or stayed a prospect as well. Okay, so that's the first list you should have for me.

The second thing I asked for you to do is just identify if your database needed any cleanup. Are people categorized correctly?

I mentioned that a lot of times when I work with clients in my coaching program, Building a Referable Business, or BRB, or at the VIP level, my VIP experience, Referrals in a Day with clients, that a lot of times we get stalled out because they have to go in and clean up their database.

It's a temporary stall. We work through it. It's not the end of the world. It happens to everybody. Sometimes it happens when you merge from one database to another. Sometimes I'll see it with law firms when they're maybe going from, I don't know, Salesforce to Lawmatics, or something to Clio, or whatever it is, right?

They'll be moving from one database to another database, and then it just doesn't transfer correctly, and then you gotta go back in, you gotta clean that stuff up, particularly if people aren't categorized correctly in your database.

And sometimes it just happens because you have different people on your team putting in different information, and no one's following the same process. And sometimes it happens because it's you in the business, and you're just not consistent with what you're logging people in as.

You've gotta be categorizing these people, right? You need to know when someone goes into your database, right? Okay, this is a prospect, and this prospect came from where, right? You gotta go deeper with that. So I asked you to identify if your database needed to be cleaned up.

Alright, third thing I asked you to do was to tighten up your intake process. So you should now be capturing where your prospects come from and

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should be labeling them correctly in your database. This is kind of goes hand in hand with number two that I'm asking you to do.

The fourth thing I asked you to do is pull out your list of prospects that were referred to you that may still have potential, meaning they were referred to you at some point this year. You could have gone further back, but they didn't say yes. So there's still a prospect. And you think there's still potential.

You're pretty sure they didn't go with a competitor. Maybe they did. Maybe finding out who they went with is great. But at this point, you're just pulling out a list of your prospects that were referred to you that may still have potential. You don't know if they do, but you're just thinking they might. So you have a list of those folks.

And then you're going to pull out a list of new connections that were made this year, specifically those who you feel could be good potential referral sources. So that new list of connections, right? Who did you meet for coffee? Who did you meet at a networking event? Who joined your group? Who joined that association you're a member of and is new, like whoever you met with, right?

And it also may be, you know, I think one of the examples I gave in the October episode 329, like it could have been a podcast host that you jived with. It could have been someone that you met at a conference.

It could be somebody that you've only ever met virtually. Maybe you're like really did a lot of connecting with them on LinkedIn. So this isn't every new connection you made in an entire year, but these are the ones that you think have the potential to refer you.

And then the sixth thing I asked you to do was create your description of your ideal referral source. This is not only one type of person. This is probably a few different types of folks, and it may be based on what they do or where they're connected or the type of clients they work with, right?

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There's a lot of pieces that can come into place there. So you're going to pull out your description of your ideal client referral source.

Okay, so here's what we need to do with this information and these lists that you prepped for me. Here's what we're gonna do with them.

Okay, number one, your list of existing referral sources, people who have referred you over the last three years. If you aren't going to put together a five to seven touchpoint plan in place, like the one that I teach my clients, please do at least one thing to show gratitude to your existing referral sources this time of year.

You can decide on what that one thing will be, but please do something. Do not go dark on the people who send you clients or try to send you clients, even if they don't become clients and they're just prospects. Please do not go dark on them. Please do not ignore them this time of year.

Of course, I think that you should have a plan of how you take care of these referral sources running in the background of your business. That's why my clients built out a five to seven touchpoint plan. And there is a science-based framework of how we build that out with my clients, but if you're not going to do it, please just do one thing, something, one thing to show some gratitude to your existing referral sources now.

Okay. Number two, you've identified that your database needs to be cleaned up. Guess what? Do it. I don't care if you have to do it yourself. Delegate it. Outsource it. It doesn't matter. Just get it done. It's probably going to take you longer than 20 minutes if your database needs to be cleaned up. And hopefully it won't take you 20 hours. But you need to set aside some time.

I was having a conversation with my assistant Kathy. And I was telling her, like, hey, in December, this is how I'm going to want us to spend our time. Because, you know, most of the time, things slow down. I mean, not always, but for the most part, things slow down for us.

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We do close between Christmas and New Year's. And so, like, she's off, I'm off. Like, we still monitor our inboxes and things like that. And we still make sure that our clients can access any of our platforms or portals and things like that that they need access to. But the office is technically closed.

So we only have a couple of weeks in December. But after I get through the in-person retreat that I do for my BRB and VIP clients, which is like the second week of December this year, once we get through prepping for that, things really slow down.

And so, you know, I'm not traveling for speaking engagements. I don't really do any VIP two-day in-person intensives with my clients in December. So things really slow down. And so I told her, I was like, we're going to be working on organization. If your database needs to be cleaned up, maybe you need to add that to the list of things that you want to get organized.

Now, for some of you, end of year is like fire drill, crazy busy. So that's not the right time to do it. But maybe now is, maybe now between now and Thanksgiving is the right time to get organizing.

If you are just trying to like, pull yourself over the finish line of this year and try to have a year like you had last year or a little bit better than you had last year and you feel like this year you've been behind, things have been slower, things have been sluggish, well then maybe this isn't the right time to do the database cleanup.

Actually, if you're slow, it is the right time to do it. Take advantage of slow times in your business by getting yourself organized and getting yourself right processes and procedures and things in place.

But if you feel like you're like going to just be humping it to the end of the year because you're like trying to make, you know, to have a good end of the year, you've got a big revenue deficit you need to make up, okay, then maybe you're going to do this in January.

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Whatever it is, though. I need you to clean up your database if you've identified that it needs to be cleaned up and organized. And what I specifically care about is that where your prospects and clients came from, that that stuff is actually noted in your database and your referral sources in your database are noted as referral sources, right? So that's the big thing.

Okay, number three. So you have tightened up your intake process. Good job, right? We talked a little bit about what that looks like back in the October episode, episode 329. Now here's what I want you to do.

If you've tightened up your intake process over the last 30 days, it probably means you have some data to look at. So I want you to review the results and I really want you to get into the habit of doing this every 30 days to see what you're capturing.

So if you remember back to the episode 329 where I talked about tightening up your intake process, for my purposes, I really just want to make sure that you're capturing where people come from when they get into your database.

Like when somebody comes to you, like when they fill out a form online, when they call your office, when they send an email, when they text, whatever it is, however somebody communicates with you, if they're referred to you by email or text, that you're capturing that information correctly, by asking. You got to know, where are these people coming from. So that's how you're tightening up your intake process.

Well, now if you've done that, right, if you're making sure that you're capturing the information of, where did this prospect, soon to be hopefully client, come from, I want you to review the results of how your intake process is working.

So I have a law firm client in D.C. who tightened up their intake process. And after the first month, they reviewed their 50 intakes. So their 50, I would use the word prospects, right? They use intakes. They reviewed the 50 intakes they had over a 30-day period. So their 50 intakes in one month.

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And the staff had only put in about 17 sources of where people came from. And the majority of those were referral sources.

And so the owner of the company said, he goes, I went back to the staff and I made them update it. I said, you need to call the people or email the people and find out where they came from. Because we took 50 new potential clients in, 50 intakes, and we only know where 17 of them came from.

And guess what? now they have about 40 filled in. It's pretty cool, right? I mean, they went back, and they got over, you know, what is that? And you guys all know I don't do math in my head, just over 20 more sources completed. They only had put in 17.

They weren't following the process. He went back and made them follow the process, go back and do extra work because they didn't do it the way they needed to the first time. And now there are about 40 or so sources filled in. And the majority of those, which is what I love, are referral sources.

And you've got to capture that stuff. You've got to capture that stuff. You've got to know where people are coming from. So if you've tightened up your intake process, you really need to be going back every 30 days and reviewing it and making sure, particularly if you have a staff, that they're actually capturing the information correctly.

And not only are they capturing it, that they're also inputting it into the system, the database, correctly. And if it's just you doing it, if you're just a solopreneur or just you and a very small team, make sure you're doing it, but still review the results. Review that it's getting done, and then review the actual what's the data telling you. That's super, super important.

I mean, just think of the opportunity that could have been lost for this law firm if they only had had 17 sources put in, the majority of those were for all sources, and now they actually have 40.

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The opportunity lost, right, of like who they could be thanking, who they could be adding to their list, who they could be paying attention to is referring them more than ever before. Like, oh my gosh, the opportunities that could be lost. It just, it's boggling to my mind. And I'm so glad that they went back and captured it.

So if you're gonna tighten up your intake process, please review your results every 30 days. So now's a great time to review what happened in October. You can do it in December, review what happened in November, right? End of the month, beginning of the next month, just review the month prior.

Okay, stick with me. We've got three more of these to go and we'll tell you what action to be taking.

Stacey Brown Randall: Hey there! Pardon the interruption. So, a little bit different what I want to share with you today. I just want to make sure that you understand the ways that you can work with me when you're ready.

So, long-time listeners of this podcast, you've heard me talking about the coaching program, Building a Referable Business, what we call BRB. You've probably also at some point heard me mention that for teams, I have a VIP experience called Referrals in a Day.

And of course, if you're just wanting to get started with all the things referrals without asking and doing anything you don't want to do, then you may have been checking out or need to check out my starter program called Your Next 5 Referrals.

Here's the thing. I want to let you know about a couple of things that are upcoming. So I mentioned that we are running a couple of cohorts. Cohorts are specific by industry. So we have an attorney one happening and real estate one happening.

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So I'm getting some questions about, will you be doing those again next year? I don't know. It's the idea of how well do these two go will dictate doing them again. But I believe I will. I just don't have a timeline to share.

So if the cohorts go according to plan and go as well as I'm hoping, then yes, they will be opportunities for you to do the coaching program, the BRB coaching program, but in six months and with a smaller group of your peers doing the work with me.

So be on the lookout for that. If you're like, hey, I think actually a cohort is perfect for me, and you're not joining this round of our attorney and our realtor cohort, and maybe you're not joining this round because you're actually not a realtor or an attorney, so you can't. Be on the lookout.

If you're interested in me doing a cohort model for your industry, let me know. We can put it out there and see if there's interest within the people who are learning and following me.

And also, please make sure you're keeping your eye on your inbox. This means you gotta be on my email list, but please keep your eye on your inbox, because we have something really cool that's gonna be happening for Black Friday/Cyber Monday.

So yeah, of course, like most businesses, we're gonna get in on the action and do a Black Friday sale. So just keep your eye on your inbox. The only way you'll hear about it is in your inbox. We'll be emailing you about it. So make sure you're checking that out.

We'll put links to all that in the show notes page for this episode, so you can check that out. But let's get back to the episode.

Stacey Brown Randall: Alright, so number four, we've done the first three, so here's the action I need you to take on the next three.

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Number four, so you're gonna pull out that list of prospects that were referred to you that may still have potential. Here's what you're gonna do. You're going to reach out to them. It's not very complicated.

You're going to see if they want to restart the conversation, review their options again. Maybe you want to share any new information or pricing changes that's going to be happening next year.

This is a great time to reach out to folks who maybe said no back in March or no in June or even no in September and being like, hey, has anything changed? And so when you do that, you give that opportunity, to reach back out to them, to put yourself kind of back on their radar to see if now is the right time.

And in particular, this isn't one of those opportunities where you should be like, hey, like you can do it as like, hey, if you join now before the end of the year, you'll get a discount. Lots of companies do that. You could do that too.

But definitely if you are going to be doing anything with your pricing for 2025, I always like to give a wide berth in terms of notice. Like, hey, like, and we're doing this ourselves. Like, we are increasing the investment to be in our BRB, Building a Referable Business Coaching Program. We are increasing that investment. And so we're not going to spring that on people with like seven days' notice. I think that's just really unfair. I hate it when people do that to me.

So, you know, we're going to be doing that ourselves, right? We're going to be communicating it to like all of our people who are like on our email list and in our social media and things like that all of our followers all of our prospects that are you know our pricing is increasing in first quarter of 2025, but we're going to give notice to that.

And of course we'll go back to anybody who's shown an interest who has maybe previous or the current pricing in their mind and just say, hey, just so

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you know that we're increasing that pricing. That's something you could be doing too.

So if you do want to say, hey, is it time to restart the conversation? Do you want to review the options of how you can work with me? Or if there's new information, hey, we've added something different and we now offer this service and we now offer this option, or of course, pricing changes, you're going to want to communicate that as well. I like to give like 60-day notice when we're communicating pricing changes.

And, you know, when you're thinking about what this looks like for your business, it may still be a no from these folks. That's not the point. The point is, is that you're reaching back out to see if there is potential. But it could also be a great time.

Now, recognize that some people aren't going to make purchasing decisions the last two months of the year. And some people are going to make purchasing decisions the last two months of the year because they're trying to have more expenses to get that tax benefit, right? To have another deduction from their taxes from an expense benefit.

So you just got to recognize that some people this is not the time of year. They don't want to be thinking about making new investments and things and other people are looking for it. So you just gotta communicate it. You don't know that prospect, which side of this they're gonna fall on. So you're just gonna communicate it to them and let them know.

And of course, if you don't have any new information or updated pricing or anything like that you're offering, there's still other reasons to reach out just to see like, hey, we talked back in February, has anything changed? Like that's a legitimate reason to follow up as well. So do that with your list of prospects.

Okay, number five, pull out your list of new connections that you made, specifically those that you determined have fit to be a potential referral source, and I want you just to send them a note.

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I just want you to take a minute and hand write them a note, not an email, not a text. You may have to do a little Google stalking to figure out their address. But send them a note. You may even have to just email them and ask them for their address.

But just send them a note and tell them that you're thankful that you connected. Or if it's someone that you hadn't connected with in a long time and you reconnected, tell them you're thankful that you reconnected. But just send them a note.

So many times we meet people, and then we get busy, and we go on to meet the next group of people. And six weeks later, we're like, who did we have for coffee with six weeks ago? We're like, we don't know. And they don't remember you.

So like this is part of what I teach in one of our strategies. It's called the running five, keeping warm framework, but it's like when you meet somebody who has potential to maybe refer you, there's things you have to approach to do first, which will feel very backwards when you learn my strategy, but it works.

And then after that, you actually have to make sure that you are staying on their radar. That is an important step. And people forget, like they have coffee with somebody and then six months go by and they're like, I don't even know who I had coffee with six months ago. Like, you need to stay on people's radar if you want them to remember you.

So, all I'm asking you to do right now is anybody that you met new this year that has potential to refer you, if you've done nothing else, please just send them a handwritten note and tell them you're thankful to be connected or reconnected.

Okay, number six. I want you to pull out that description you created of your ideal referral source. So it may have a couple of different ways that you're looking at who is your ideal referral source. I don't have just one type of human or one type of person that refers to me.

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Yes, my clients refer to me. That's always going to be one category of an ideal referral source. But then when I'm looking at my centers of influence that refer to me, like who are those people? And so you may have a couple of different avatars, so to speak, in that regards.

So I want you to use this as you look to add new people to start referring you next year. So when you have this description of who your ideal referral source is, you can use that to kind of guide decisions you make as you're starting the new year of who you're going to cultivate or try to cultivate into referral sources.

But the thing you need to do before you're like, yes, I've got my ideal referral source description, like who they are, I must start identifying those folks. You know, in the groups that I go into, like the networking groups that I'm in, the leads groups that I'm in, the events that I go to, the trade shows that I go to, maybe it's the people that I'm communicating with on social media, right?

Whatever it is, as you're going to use that description to guide who you're going to focus on connecting with because you're looking to add new people to start referring you.

But here's something I need you to do as you're doing that. You really need to determine how many new people you need to start referring you, which means how many new referral sources do you need, right?

So how many potential referral sources do you need to become an actual real referral source because they've started referring you? And then once you know how many new people, new referral sources you need, then you can create a plan to identify and cultivate.

Okay, so that's the six things I asked you to pull together in episode 329. And now in this episode, 334, I'm telling you what to do with those things. And we're gonna do a one more round of this with our December episode, okay?

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You got this. You completely have this. I have full confidence in your ability to do this, to carve out the time and do this work. And if you want more referrals, particularly, my friend, if you want them consistently, you have got to start somewhere. These six steps will get you started. So get to work, my friend.

All right, of course, if you are wanting the resources that we mentioned, maybe it is how to work with me, maybe it is the link to [episode 329](#), so you can go back and listen to these in order. You can just go to the show notes page for this episode at StaceyBrownRandall.com/334. That's StaceyBrownRandall.com/334. 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.