



**Full Episode Transcript**

**With Your Host**

**Stacey Brown Randall**

**Stacey Brown Randall:** Hey there, and welcome to the Roadmap to Referrals podcast, a show that proves you can generate referrals without asking or manipulation.

***Roadmap to Referrals with Stacey Brown Randall***

## **Ep #366: The 10 Golden Rules for Getting Referrals Without Even Asking**

I'm your host, Stacey Brown Randall. I'm a card-carrying member of the Business Failure Club, have taught my referrals without asking methodology and strategy to clients in more than 14 countries around the world, and my mission is to help you unleash a referral explosion by leveraging the science of referrals and respecting your relationships.

Alright, well, today we welcome Jay Berkowitz to the podcast as our first guest host of our podcast takeover series.

If you're a new listener and you have no idea what I'm talking about and don't know what the podcast takeover series is, well, you need to go back to last week's episode, episode 365, where I explain what's happening with our summer series.

We are doing a podcast takeover. So we are going to now welcome Jay and him interviewing me on his podcast to this podcast. So let's get to it.

**Jay Berkowitz:** Hey, this is Jay Berkowitz from the [Ten Golden Rules of Internet Marketing for Law Firms podcast](#). I'm doing a podcast takeover of the Roadmap to Referrals podcast this week. And following is the episode where I interviewed Stacey over on my podcast.

And guess what? This is a really good one. Stacey and I developed the 10 Golden Rules of Generating Referrals Without Even Asking. So please enjoy this episode.

And if you love it, please reach out to me at [tengoldenrules.com](https://tengoldenrules.com), go follow my [podcast](#), and give Stacey a follower five-star review.

Good morning, good afternoon, good evening, whatever time this podcast finds you. Thanks for finding us at the 10 Golden Rules Internet Marketing for Law Firms podcast.

We have one of our most fantastical guests today. Stacey Brown Randall is the author of Generating Business Referrals Without Asking. And we'll get into a little bit more details about her in a minute.

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You're gonna wanna listen to this one because not only is she gonna share some of her secrets, but we've crafted them in true 10 golden rule style into the 10 golden rules of referrals without asking for attorneys.

Bear with me for a sec and take one minute. If you're watching on YouTube or listening on iTunes, please subscribe to the show because we have lots more great content like this every week, amazing guests and amazing content.

And we're doing more of these 10 golden rules style formats. If you like these, you definitely want to hit the subscribe button and throw in a five-star review. We wouldn't mind that either. Without further ado, Stacey, welcome to the 10 Golden Rules podcast.

**Stacey Brown Randall:** Thank you, Jay, for having me. I'm glad to be here.

**Jay Berkowitz:** So you're known for as the creator of Referrals Without Asking methodology. You're the host of the Roadmap to Referrals podcast, the books Generating Business Referrals Without Asking. Tell us a little bit about your journey and how you became the Referrals Without Asking expert.

**Stacey Brown Randall:** You know, it'd be a really cool story if I could tell you that one day I just woke up and God was like, OK, now you're going to be brilliant when it comes to referrals and you're going to be a contrarian and you're going to talk to people about how to do it without asking.

That is not how it worked. It came from the school of hard knocks, as most things that are good in life do. I actually had a business that failed after four years. It didn't quite make it to the five-year mark. And I knew I was meant to be an entrepreneur.

So when I was like licking my wounds and overcoming the ego blow that having a business failure causes, I decided I had to go back to corporate America, which is even worse, having to go back to get a job.

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But while I was there, I was like, other people are successful with running businesses. I should be able to be too. Let me figure out maybe what I did wrong.

So I did a lot of soul searching and sort of figuring out what I did wrong. And one of the things I noticed is that business development, right? You have to have a way to generate new clients all the time. This is not, this is like business 101. Most people know this.

But you have to figure out a way to do it, let's be honest, in a way that works for you so that you will be consistent with it and you will keep doing it. And it has to work too. I can't just feel good and not work.

So for me, I realized, wait, referrals are amazing. I never got one with my first business. And I was like, OK, if I become an entrepreneur again, I'm going to figure out referrals. And then, of course, you can go search referrals and then you're inundated with a ton of advice that never felt right or good for me.

And I was like, OK, so I want to do it differently than those folks. So when I started my second business as a productivity and business coach, I had gotten certified while I was back in corporate America. I was like, let me figure this referrals thing out and let me see if I can do it without having to ask for them.

And I threw a bunch of spaghetti on the wall. I was like, let's see what sticks. Eventually, lots of things stuck and the right thing stuck. And I generated 112 referrals my first year in business without asking for them.

My clients wanted to know more. So I started teaching it to them, which really forces you to reverse engineer what's working, why it's working, what's the framework, what are the strategies, what's the language points. So I started refining that. And here I am 12 years later.

**Jay Berkowitz:** Alright, well, let's get right into the magic, because I think everyone's like me, like, oh, I want more referrals without asking. So the



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first golden rule of referrals without asking for attorneys is defining referrals correctly.

**Stacey Brown Randall:** It's amazing to me how many people think they know what a referral is. And then we'll start talking about it. And I'm like, that's not a referral. And they're like, oh.

People will assume like repeat clients that come back to work with you again are a referral. They assume that like word of mouth by someone telling someone else about you but never connecting you to that person as a referral. And none of those are referrals.

People who think testimonials are referrals. Like, no, those aren't referrals. They're all individual things that you need, but they're not referrals.

A referral is defined in two ways. Number one, there's a personal connection. You'll always be connected by the referral source, which is just what I call the person who refers to you. You'll always be connected by the referral source to the prospect. So there's always that personal connection.

For attorneys, this usually happens over email. It may happen over a text thread. Very rarely will it happen in person because all three parties are at the same event.

And then, of course, the second piece of that definition after personal connection is that the needs been identified. That the prospect knows they are the prospect. They know they need an attorney, which is why they're willing to be connected to you, to be referred to you, to have a conversation about maybe hiring you.

So the need has to be identified, and there has to be a personal connection. When there's no personal connection, but a need's been identified, it's word of mouth buzz.

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When you've been connected, but there's no need identified, we don't know who the prospect is while we're being connected to someone else, that's just an introduction.

And those are three different things, introduction, word of mouth buzz, and referrals. They're not the same, and we need to be clear on that.

**Jay Berkowitz:** So in B2B, we're always taught in like the networking groups, BNI, ProVisors and stuff like that, that a great referral is an email where, and obviously, like you said, a need is identified.

So my friend Karen was in an accident. She's looking for a personal injury attorney. I'd love you to meet these guys. Or my friend Dave is going through a divorce, and he needs an attorney. I recommended your law firm.

So that's a personal referral and needs identified. But for personal injury too, a ton of referrals amongst consumers, a lot of times you just get a call and then you ask the person, where'd you hear about us?

Oh, my friend Karen was a previous client. So those are okay too in that more consumer facing way, right?

**Stacey Brown Randall:** Yeah, definitely. I mean, whether it's B2B or B2C, the reality of it is, as long as you know what the connection was, then it is actually a referral.

What I want people to avoid is when somebody comes up to them and they say, Jay, I know an attorney really needs help with what you do. I gave them your name and number. So she's going to reach out.

That's not a referral to you. It's so close to one. We call them almost referrals, but it's really word-of-mouth buzz. And in that moment, it's about you knowing, okay, wait, that's not a referral. That's word-of-mouth buzz. I'm missing the connection. I need to see if we can make the connection happen.

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Because if not, you're not in the driver's seat. So the reason why I kind of like beat the drum and I wanted this to be the first golden rule is because when we don't know what's arriving, we don't know how to respond correctly.

And so identifying it is really important so you can be like, wait, Stacey's said that's not a referral, that's just an introduction. Or that's not a referral, that's word-of-mouth buzz. So you can fill in the gap.

**Jay Berkowitz:** Yeah, and for clarity, you know, what we're saying here is, it's not really good enough to say, hey, Jay, I met this law firm, and they're looking for a new digital agency. They want new SEO guys, and I gave them your name. Because nine times out of 10, I never hear from those people.

That personal introduction is great. And then the personal connection, I just wanted to comment on that because I've joined ProVisors in the last year. And if folks out there don't know ProVisors, it's like a BNI, but it's really mostly attorneys, professionals, accountants, and it's national.

And it's pretty, I call it like grownup networking. It's not your local networking with the plumbers and the air conditioning guys, which is great too, but ProVisors has a much bigger scope in my experience.

And there's a term that I hadn't heard before, which is know, like, trust, refer. And know, like, and trust for years has been talked about as people aren't gonna send a referral until they know you, they like you, they know what you do, and they trust you.

But know, like, trust, refer is the ProVisors added that. And so I think that's my interpretation of what you mean by personal connection.

That people really get to know you, they know what you do, they like you, they trust you, they maybe heard you do good things, and then they're gonna refer you. Is that a safe assumption?

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**Stacey Brown Randall:** Yeah, I mean, I think at like a high level, it is. When we get into a few more of these golden rules, I'm gonna unpack that a little bit more about what the trust factor actually means when it comes to referrals. It's not actually what people think.

And so when we talk about the science piece, we'll unpack that a little bit more. But yeah, I mean, no one's going to refer you if they don't first know you, like you, and trust you, obviously.

And no one's gonna hire you either. So it could be, you know, know, like, trust, hire, right? I mean, you need it for all things. whether it's referring or hiring.

**Jay Berkowitz:** I love it. Alright. The second golden rule of referrals without asking for attorneys is know where they fit.

**Stacey Brown Randall:** Yes. This is so very important. And most people believe when you're taught business development, you are taught that business development is like a two-legged stool, or you have two parts to your plan.

You're taught that your first leg of your stool is prospecting, and then you're taught the second leg of your stool is marketing.

And so the idea there is this prospecting is going to ProVisors, or going to BNI, or doing 7 million cups of coffee when you're doing your one-on-ones, or maybe you're cold calling, or cold emailing, or cold direct messaging on LinkedIn.

There's a number of different things, that's obviously not an exhaustive list, of things that are considered prospecting in nature, trying to get you as quickly and as close to the prospect as possible, right? And so it's lots of things.

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But then there's the marketing side. So maybe that is online marketing that you're doing. Maybe it's sponsorships that you do. Maybe you're trying to get some earned publicity and you're trying to get some PR.

Obviously, it's having a website. That's really important. Social media. So there's lots of things that you can do that are marketing in nature.

For forever, we have been taught that those are the two legs of your business development or sales strategy. And when you think like that, and you think that there are only two legs, then you assume that referrals has to fit into one of the two legs.

Which means if you assume that referrals fit into prospecting, the type of advice that you will then teach or believe is that you gotta ask for them or you have to compensate for them.

Or you have to make sure that you are always networking, to always be seen, so no one can ever forget about you, so they remember to refer you.

If you believe that referrals, though, fit in the marketing side of that leg, then you believe, in some cases, that it's referrals from a marketing perspective, they become very gimmicky and very promotional.

And those are the strategies that have been taught for decades and decades and decades. Ask, pay, be gimmicky and promotional, or network all the time.

And the idea there is those ways actually violate the science of referrals, which I know we're going to get into in a little bit. But it's really important for people to understand prospecting is good. Marketing is good.

But you have a third leg to your stool for your business development strategy. And that is a separate leg. And it's the referral leg.

Which means everything you do, who you do it for, what you say, what you do, what you don't do, the cadence that you follow, everything in that referral leg of your stool is different.

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The mentality is different, the end user is different, the receiver of your message is different than prospecting and marketing.

So you've got to separate out referrals from prospecting and marketing, give it its own leg of the stool in your business development strategy and make sure you have the right plans and strategies in place to be able to generate those referrals.

**Jay Berkowitz:** Okay, great. And we're going to get into them as we go, right? This is the tease. Well, there's obviously a tease in the next one because the next one is make referral tracking sexy.

**Stacey Brown Randall:** That's only because most people say tracking is boring and not sexy. The number one thing that I find that people are lacking when they want to talk to me about referrals and I ask some questions.

So whether I'm doing a hot seat on a workshop that I'm doing, or people are scheduling time on my calendar, there's a couple of questions I ask them. And I know instantly if you're tracking or not.

And one of the questions I always ask is, how many referrals do you get in a year? Like, what's your average number of referrals that you receive in a year? Not that you're closing into clients, but that you're receiving.

And then the other question I ask is how many people do you have referring to you? How many referral sources do you have referring to you?

And when I get the ranges, like, oh, I don't know, maybe I get five to six referrals a year, but I have 30 referral sources. I'm like, clearly, you're not tracking. You don't know because those numbers don't align. Or I'll get things like, I don't know, or unsure, or I'll get these massive ranges.

Tracking is really important because it tells you what's working. And if you're going to invest the time and energy and resources into having a

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referral strategy within your law firm, you darn well need to know if it's working.

It's no different from what you teach, Jay, or what anybody else teaches. Like, we need to know that it's working. And tracking is the only way to do that.

When I tell folks that I want them to track, it's like, think of a spreadsheet. It's five columns. And those five columns are the date that prospect arrived, the prospect's name, where that prospect came from, which I call the source.

And if that source is they were referred to you, then I want you capturing the referral source's name. That's really important.

Then the fourth column is outcome. Like, did they become a client? Did they say yes? Did they say no? Did they say not now, follow up with me in the fall? What's the outcome?

And that has to be updated because outcomes change. And then what was the revenue that you made from that prospect that said yes to being a client?

Those are the five columns I want you tracking. Date, prospect, name, source, and if it was referred to you, the referral source's name, the outcome, and then the revenue.

When you're tracking those, and I can see that on a spreadsheet, I instantly know what your problems are and what's going well. And I don't know any of that.

And I don't know like, hey, you need this strategy or this strategy, or you need to work on quality and actually closing, or you're not getting enough referrals.

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I don't know where to send you to get started, to get more referrals without asking until you have the data to show me, and that all comes from tracking.

**Jay Berkowitz:** And then you can look at it probably monthly or quarterly where there's enough data. And then you can really start to see, hey, this person sent me three or four in a quarter. I want to double down on either that person or more people like that person.

**Stacey Brown Randall:** Right. And it's just everything. It's like, you can start seeing who are the types of folks that are referring to you.

Like some people will tell me, oh, I get most of my referrals from clients. And then they'll do what we're gonna talk about in one of our upcoming golden rules, but then we'll do the step and they're like, oh, just kidding. I don't get them from clients. I get them from centers of influence.

I'm like, yeah, because you have like a recency bias, right? You remember the last two or three referrals you got and where they came from. And then you apply that knowledge to like the entire part of referrals in your business. And that's not always the case.

**Jay Berkowitz:** I love it. Well, I know what I'm doing very quickly after this meeting is setting up a tracking spreadsheet.

**Stacey Brown Randall:** Good. I'm glad to hear it.

**Jay Berkowitz:** Golden rule number four, know the players.

**Stacey Brown Randall:** Yes. So the players and when a referral is happening, there are three of them and you have to know them, and you have to know your place.

So the three players are the referral source, the prospect, and then you, but you just serve as the solution provider. And that's in order of importance.

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The referral source, the person referring you, the prospect, the person who is being referred to you that hopefully will hire you, and then you as the solution provider. You're just getting that referral because you're helping the referral source look like a hero or be a hero when they refer someone to you.

Most of the time, people aren't referring to you because they're trying to help your business grow. That's an added benefit. It's a secondary piece though.

What they're doing is they're referring to you because they are helping someone they know that has a problem. And how they're helping them is by referring them to you.

So you're just the solution provider. Now, you're important, but you're the third most important person in the cast of characters or these list of players.

**Jay Berkowitz:** Fantastic. Something that I've been spending a lot of time on the last year. which is referring referrals, or I don't know exactly what you call it, but you probably have a better name for it. I'm probably usurping one of the future golden rules that you're about to get to.

But this has been great for us, which is understanding that for me, if I spend my time networking with an attorney, I can get one sale or maybe two or three if he hires us, likes us, and refers a couple of his buddies.

But if I spend time with folks like yourself, people who are software providers to attorneys, coaches for attorneys, people who have 50, 100 attorneys or 500 attorneys that they deal with, and they get to know, like, and trust and believe in 10 golden rules. And they recommend us as a solution to someone's problem.

And typically, that's, they're not happy with their number of leads, their number of cases coming from the internet, or they're not happy with their provider, their web guys, they call it.

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So if I build relationships with 50 people like that, it's great for my business. So is that what you refer to as referring referrals?

**Stacey Brown Randall:** Referral source, yeah. So yeah, the truth is, we're not talking about this in the 10 golden rules, so let me just sneak it in right now, because I think it's beneficial, is there's actually four types of referral sources.

The first one is your clients. Now, not everybody I work with, personal injury attorneys is sometimes one of them, there's not a concerted effort to generate referrals from their clients.

They know if their client knows someone who has something happen to them, they're probably going to be the one that gets referred.

So the focus there, when I work with personal injury attorneys, isn't actually on clients. But for a majority of other attorneys and other business owners, clients is a good source of referrals.

The second type are your centers of influence. Those are the people who know what you do, don't do what you do. So there's no competitive overlap. And it's this statement that's most important. Come across your ideal client with some level of regularity.

So for you, it being a software provider that provides software to attorneys, that is a COI for you because they know what you do, they don't do what you do, and they're sitting on a bunch of ideal clients for you.

So clients and COIs are the top two. That's who I focus all of my strategies on. That's who we spend our time and energy on developing into referral sources.

The last two are what I call below the line, and not everybody will get referrals from these last two, but the third group is friends and family.

So people who know you. that may come across somebody who needs you but that's tough. Like my mom loves me and would love to support me, still

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12 years in, not a clue of what I do. I mean she can tell you I have a podcast, and I have a book, and she can also say she's listened to and read none of it.

**Jay Berkowitz:** So she doesn't come across a lot of businesspeople who need referrals without asking.

**Stacey Brown Randall:** She's just not. She's working at my brother's restaurant in South Carolina, and she's not coming across people who need me.

But my husband does. But he's my husband. As long as we're married, I don't need a strategy to cultivate more referrals from him. So that's why we call friends and family below the line.

And then the fourth group are actually strangers. which of course kind of contradicts what I'm saying about referrals come from relationships.

But the truth is sometimes you've been in business long enough. You have a reputation that has grown. There are people who knew somebody who knew somebody who knew somebody who had a great experience.

And for whatever reason, you stuck into their brain and randomly when an opportunity presented itself, they're like, you got to call Jay. I don't really know him personally. I've never worked with him, right?

That person's a stranger to you. You're not a stranger to them. Some people will never have strangers refer to them. Some people do, it kind of depends on the geographical makeup, the larger you are.

So like I'm national and international, I can have more strangers refer me. I also have a book out there, a podcast, it makes it a little bit easier from a name recognition perspective.

Some people will never have strangers refer them and some people will, but those are the four types of referral sources, clients, COIs, family and friends, strangers.

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So that's important to kind of recognize when you're looking at understanding these cast of characters, the knowing the players.

**Jay Berkowitz:** That's great. And thanks for that little side shuffle. And I assume you did answer a question I was going to ask, which is podcast listeners, people that read your book, those are strangers, but they feel like they know you, but you've never met them.

**Stacey Brown Randall:** Yes. And they know a lot about you. Particularly the longer they listen. I actually had somebody come up to me at an event once.

I was speaking at an event, and she came up to me, and I was talking to somebody else, and she came up to me. She was like, you're Stacey. I know it. I can tell by your voice without even seeing your face. She was like, I listen to your podcast every week.

She was like, you sound the same. I'm like, I hope so, because it's me on that podcast every week.

**Jay Berkowitz:** That's awesome. Alright, we're going to go quick to keep the pace on the next ones. Number five, the happiness trifecta.

**Stacey Brown Randall:** Yeah, so five, six and seven of these golden rules break down the science you need to understand of referrals.

So I'm gonna do the high level, not the adjunct professor view. We'll do the high-level perspective of this. So there are three things that are happening from a science perspective.

The first one being our fifth golden rule of referrals without asking is understanding what's happening in the brain, which is the happiness trifecta.

It's the chemicals like dopamine and its two cousins that are released or triggered when you do something that feels good.

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The happiness trifecta that we're concerned with is in the brain of your referral source, the person who knows the prospect and decides to help them by referring them to you to fix their problem.

So the happiness trifecta, I always tell folks, you gotta understand that when a referral source is referring someone to you, it's not about you. It's about them feeling good, happiness trifecta being released in the brain because they get to be the hero and they get to help someone.

And you really need to know your place in this. It's not about you, it's about them. And so nurturing that relationship with your referral source because they are the hero every time they refer and coming from that place.

I don't mean being gimmicky or anything like that with the hero thing, just understanding that they aren't doing it for you. They're doing it to help someone else, and you need to honor and respect that.

And so understanding the brain science, the happiness trifecta is really important. That's the first piece of the science.

**Jay Berkowitz:** But once you understand that, how do you do it? Like just say, Hey, if you refer me, you're going to feel great because I'm going to provide a solution.

**Stacey Brown Randall:** Well, now you're jumping ahead. We haven't gotten to that one yet.

**Jay Berkowitz:** That is another one. Okay. I'm going to let it go. So let's go to number six, the psychology of trust.

**Stacey Brown Randall:** And I will say the first thing you should do when someone refers you to nurture that feel good happiness trifecta is you should send a handwritten thank you note.

You cannot unleash a referral explosion by just sending thank you notes, but it is a fundamental piece of what you need to be doing that you need to be focused on.

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I always tell folks, why should I send you another referral if you can't thank me for the one I just sent you, right? So that's one thing you can do is send that handwritten thank you note.

Alright, so the second piece of the science that comes into place with referrals, you have to understand, and this is the one most people have a good grasp on, but that's the psychology of trust and understanding the trust factor in referrals.

But here's what people think. People think that you have to know how amazing I am and all the things I do to trust me. That's actually not true.

I don't actually have to know everything that you do. I do have to believe that you do a good job and that you know what you do. And I do on some level have to understand what you do so I know who to refer, right?

But at the end of the day, what actually cultivates that trust that I have in you is actually how you nurture our relationship. It's more of the like factor than it actually is the trust factor. And that's what people get wrong.

People think I've got to train my referral sources on who to refer to me and how great I am. I'm like, your referral sources aren't dogs. They don't need to be trained, right?

They probably need some guidance. They probably need some understanding, but you have to figure out how to do that in a way that doesn't feel like you're lecturing them.

And so many times when we ask people to refer us or we try to tell them who's our ideal client, we're lecturing at them. And they didn't ask for that.

So you have to have the right language and the right conversation points and the right messaging for this to land with somebody else, so it feels like it's part of conversation.

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So that trust factor that comes into place that is so very important, while, yes, I have to trust you. but to trust you, you need to maintain a relationship with me.

And maintaining a relationship with me means that I continue to know you and like you so that the trust naturally grows. Because of course, you can easily lose my trust, right?

But the reality of it is, I don't have to know how perfect you are to trust you, but I do have to like you to get to the place of trusting you. And that's where referrals are gonna hang out.

**Jay Berkowitz:** Right, and number three of the three scientific factors is behavioral economics.

**Stacey Brown Randall:** Yes. So, okay, this being our seventh point, right? The idea here is behavioral economics comes into place because it's how I build within the framework that I teach my clients, kind of like part of my secret sauce, is we leverage what I call the positive side of behavioral economics.

So I don't like it when people use behavioral economics for evil, taking advantage of reciprocity. I can't stand that one.

But we look at some of the positive parts of behavioral economics and it's how we build the frameworks and the outreach that we do for our referral sources, for the people who refer to us or the people that we want to refer us.

And so this is that third piece of the science is understanding how behavioral economics comes into play. At a high level, it's all about really nurturing and cultivating the relationship with the person who will and can or already does refer to you.

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So behavioral economics is about, this is not take you to coffee every month. Right? Nobody has time for that, first of all. And second of all, it's the same thing over and over again.

One thing about behavior economics is variety. You got to show up differently from time to time. You got to say different things. You got to be a part of their world in a different way.

And you don't have to spend, this isn't like, I got to take people to coffee every month. If I told someone that was the strategy, nobody would hire me because nobody has time for that.

Imagine you have 30 people referring you. And then I'm like, now take them to coffee every month. No, that's not how this works. No one's going to do that. But that's also what the science says you shouldn't do.

It's also when people are like, my newsletter is what I use to nurture my referral sources. I'm like, well, then you're failing because your newsletter is not nurturing your referral sources.

Is it needed? Yes, I have one. You should have one.

Newsletters are great, right? And your referral sources can receive them as well as your prospects and your clients and everybody else in your database.

But that's not the nurturing that we need to do for people who will actually see referring you in opportunities as they present themselves.

And I think that's the thing that people don't ever pay attention to with behavioral economics is knowing that for a referral to happen, I need desire and opportunity. And guess what? I only control desire.

I don't control when you'll come across opportunity to refer to me, but I do control the relationship that we have, how I work to nurture that relationship so that you have the desire to pick me and only me.

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So when someone says, hey, Jay, I need more referrals, you're like, Stacey, that's the only name that would come to mind. Right.

So I control the desire that you would pick me to refer to, but not your opportunity. And you have to understand that. And that all works into playing with behavioral economics.

**Jay Berkowitz:** So you said show up differently. So let's use an example. Stacey talks to a lot of attorneys. I want to be top of mind when someone tells her their internet marketing's down, their leads are down. How do I show up differently? Because you said like's more important than the know and trust.

**Stacey Brown Randall:** At the beginning, yes. So here's the thing. That means that if I'm not referring to you, I fall into a category that we would call potential referral source. So I'm not an existing referral source.

What you would do to nurture more referrals from me if I was an existing referral source, that's a different strategy. That's a different, what we call touch point plan, which we're gonna get to.

On the potential side, if I've never referred to you, right? This is like the number one people always ask. They're like, what do I need to do and what do I need to say?

I'm like, the first thing you actually have to do is stop worrying if I'm going to refer you. Because when you come in wanting that, I can tell. Your language is that way. There is a forcedness to this relationship building.

The number one thing you should do is focus on how you can help me. And this is not rocket science. I think we've been hearing this for forever. Why don't you focus on the other person before you worry about what happens to you, right?

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But the way I teach the strategy for cultivating a brand-new person to start referring you is really paying attention to, okay, let's establish a relationship, yes, but let's also focus on them.

Because here's the thing, you need to impact how I feel about you. And when you can impact how you feel about me, and the fastest way to do that is to make me the center of your attention, right? And make it about how you can help me.

That doesn't mean you can refer to me. That doesn't mean you'll be able to refer to me, but it means how you can help me. It's getting to know me and understanding things about me and listening for ways that you can help me, right?

Once you impacted how I feel about you, then you've earned the right to direct how I think about you. And then you can start planning referral seats.

And that is like, that's always what I tell my clients. I was like, my language piece is my secret sauce. It's the bulk of my intellectual property of what I teach people is how we say the things so that it sounds normal to you. And it also does its job and starts to plant itself in your subconsciousness.

And so that's an important piece. If you're trying to get me to refer to you, stop worrying if I'll refer to you. Focus on me. Focus on helping me.

Focus on listening for the ways that would work, building that relationship, building that friendship, planting referral seeds throughout the process, because you still don't control if I'm ever going to come across the opportunity. to refer to you.

There are lots of people who work with law firms, right? Like business coaches, CPAs, right? Folks like you, internet companies like yours. Obviously, there's the database companies too and software companies as well. There's a ton of them.

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They don't all ever have conversations with their clients about referrals though. But some of them do. And it's knowing that is way more important and targeted than anything else for me.

So I know the CPA working for attorneys is going to have conversations about lead flow. It's going to happen.

And so if that person's like, wow, you're not getting any referrals, I need to refer you to Stacey, right? I know that works well, but somebody else may not necessarily refer to me in the same way. And it's the same thing for you.

**Jay Berkowitz:** I love it. One of the questions I ask in my networking meetings, one-on-ones, and also on this podcast—and it's coming up, by the way—is, what's a great introduction for you?

Who would you like to meet? Who can I send your way? Who can other people on this podcast refer to you? Is that a good way to ask that question?

**Stacey Brown Randall:** The idea behind that question is, if I ask it of you, you're going to ask it of me. And there's an exchange of who we should actually refer to each other. It's not a bad question.

You do need to know the answer to it so that you can refer to them and hopefully they need to know your answer so they can refer correctly to you. It's where you put that in the conversation.

Most people are going to ask that question. You're doing it on a podcast episode because it's how you wrap up each episode. That's different.

But in a coffee meeting, some people are going to be like, I've got to ask you this question in our very first coffee meeting so that I can see what's there and I can understand. And then you'll ask me the question so I can tell you. And then nothing.

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Like part of the strategy to cultivate somebody to refer to you is to identify the right people, cultivate that beginning of that relationship.

We usually call it the first conversation. And then there's a whole keeping warm process that you have to maintain to maintain connection to that person.

And so from that perspective, the question's fine. It's just when and where you ask it. Most people force it way too early in the conversation.

**Jay Berkowitz:** So is it better if I can determine that from the conversation and then come up with something like, oh, a great introduction for you would be someone who's looking for an accountant who specializes in working with law firms.

I was just talking to one of my clients and their accounting is all messed up. I'm going to send him your way. Is that a good fit? So that I do it proactively without asking the question?

**Stacey Brown Randall:** Yeah, so you can. I think a better way to say that is, I found in my business, one of the best ways for me to grow is by generating referrals, but I'm curious if it's the same for you.

Do you get a lot of clients by referrals? Does that work for you? And then let the conversation unfold naturally. You're getting at the heart of what you wanna talk about, but you're creating it like business owner to business owner dialogue.

I get a lot of referrals or I'm getting some referrals, I'm working on getting more, just whatever, just say whatever's real, don't lie. And then say, is that how you generate most of your business? Do you get a lot of referrals? What does that look like for you?

And then you can naturally flow into who usually refers to you or what's the best type of person to refer to you. But it has to be a conversation that the person you're talking to wants to go into with you.

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And usually, another business owner will be happy to have that conversation. It's just a different opener so it lowers their defenses.

**Jay Berkowitz:** Okay, great. Number eight, the referral ecosystem.

**Stacey Brown Randall:** Yes. Okay, most people teach that every referral is a nail, and so the only tool you need is a hammer, meaning you need one tool, how to ask or how to compensate.

The truth is a referral is not just a nail, and the tools that you need in your toolbox are plentiful. You don't need a ton, like you're doing 15 different things, but you need different tools for the situation.

So when I teach referrals, I teach how referrals live in an ecosystem within your business. There are referrals that come from people, from specific people, either existing referral sources or potential referral sources.

There are referrals that come within your client experience. So you want to have a referable client experience.

There are referrals that can live and operate within your buyer's journey when people are deciding to work with you.

And then also, if you think about it from the perspective of other things, kind of miscellaneous others, but it's like maybe your events that you're doing, your networking that you're doing, social media, other things that you're doing where you can weave in when appropriate referrals.

It's like an ecosystem and it kind of feeds itself. That's the reason why I teach my referral strategies, and we do it based on order of importance, but also what needs to happen when a situation happens.

So, for instance, we were talking earlier about you get word-of-mouth buzz. You need to know how to turn that into a referral. A situational strategy that I teach is called the flip scripts. It's how we flip word of mouth buzz or an introduction into a referral.

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It's situational. It's like, once you've memorized the script, you don't think about it again, you just use it, right?

But then there's other things that we have that are, this is a plan and it should run throughout the year in your business. And that's what I mean by ecosystem.

It's not just, you want referrals, go ask for them. It's, no, they're like hiding in a lot of different places in your business. You just need to know the right strategies to uncover them and then nurture to get more of them.

**Jay Berkowitz:** Sounds like a good lead into the next one. Identify existing sources of magic.

**Stacey Brown Randall:** Yes. So this is your ability to identify your existing referral sources. And it does feel a little bit magic when you can just start getting more referrals from them.

One of the things I always tell folks is that you need to know who's referring you now because that is your business's pot of gold. That is your business's biggest asset that you have. That is your list of gold.

It's the people who already believe in you and refer to you. And then if you have people referring to you, the number one place I'm gonna have you start when you work with me is cultivating a plan to take care of those people. But if you can't tell me who they are, we don't get to take care of them.

So the three-step process that I use to identify those referral sources are first and foremost is make sure like, how this process works is you just wanna make sure you're capturing all your clients' names.

So like write down a list of your clients that you've had so far in 2025 and all of '24 and '23. If you want a gold star, I need three- or four-years' worth of data. So you list out your clients.

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Then you're going to list out all the ways that they heard about you. What was their source, right? Did they come through a Facebook ad? Did they come through a pay-per-click lead on Google?

Did they come through a filling out a contact form because they did an SEO search? Were they referred to you? If they were referred, I want you to write down the referral source's name, right?

Do you happen to know them because you went to college together? They're just a college buddy. They're just part of your network. How do they know you? How do they find you?

So first column is client's name. Second column is how they heard about you, the source. And then of course, the second step you're gonna do is just sort that. And I just want you to sort that so you're looking at all the referral sources.

So if you have a list of all your clients and then all your referral sources, now we know, oh, these are the people who've actually referred me that I've converted into a client.

You have to go through this process again with your prospects because sometimes you're referred people who don't hire you, and that's OK. You need to go through the process with step one, list out your prospects.

Step two, make sure you put down the source of how they heard about you.

Step three, sort by making sure you're grouping together the referral sources names. Then you've got your prospects and your clients. Who's referred both of them?

You combine that together for one master list, and that is your master list of existing referral sources. That is your gold. That is your business's biggest asset, your list of gold, because they're already referring you.

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And just like it's easier to get a client to hire you again than it is to get a new client to say yes, it is easier to get an existing referral source to refer you more than it is to get someone new to start referring you.

**Jay Berkowitz:** And how do you do that?

**Stacey Brown Randall:** And that's number 10. We've arrived.

**Jay Berkowitz:** The plan. The plan.

**Stacey Brown Randall:** Number 10 is the plan. Yeah. So this is just one of the plans, right? This is if you have existing referral sources.

What I tell folks is you're going to build out a plan. We call it a touchpoint plan. Some people like to call it the outreach plan. I really don't care what you call it. But internally with my clients, we call it the touchpoint plan.

You're looking for five, six, or seven touchpoints in a year, so that there is a cadence to them. What you do is not nearly as important, I mean, it's important, but it's not nearly as important as being consistent and having the right cadence, and then what you say when you're doing your outreach.

Now, the number one question I always get is, tell me, Stacey, what are my six or seven or five touch points going to be? And my answer is always, I don't know yet, because I don't know who is actually referring to you.

Clearly, if you told me, hey Stacey, most people who refer to me are guys in their 20s and 30s, we're gonna create a different plan than if you tell me most people who refer to me are men and women and they're in their 30s, 40s and 50s and 60s. There needs to be an idea of who is referring to you that would tell us what the plan will look like.

Now with my clients, I do have a few must-dos because we know that they work, we've been doing this for 12 years, but you have to figure out what your referral sources need and then what's, authentic to you.



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So if I said, everybody's got to send a bottle of champagne to their referral sources, that is not going to work for the recovering alcoholics that are going through my program that are like, I don't send alcohol because I don't do alcohol. It's not for everybody.

So it's the what you do has to be developed and decided on once you know who you're doing it for. But it's five, six, or seven touch points. And you're going to do it with a cadence.

You're going to use those as opportunity to deliver the right type of referral seed language. But it's going to be about them. What do they need? Most of the time, they need to be thanked and shown some gratitude. And we just package that up into a touchpoint.

But this does not mean seven gifts. Right? Maybe one gift, maybe one level of one-on-one time, maybe a couple of things that show up in the mail, like variety. That's what we want, let's go back to behavioral economics that we talked about in the seventh golden rule, right?

The variety that we put in place from behavioral economics and what is remembered and what is not, and what is quickly forgotten, like email is not a part of this plan.

Your newsletter does not fit in this plan, but there's gotta be variety to what you do. And that's how all these pieces start fitting in together.

**Jay Berkowitz:** I got a handwritten thank you card the other day, and it included a very nice restaurant gift certificate. And she mentioned that she did a little bit of research locally and she did find one of the greatest local restaurants.

And it was a decent enough for a really nice meal with my wife. And that really stood out in my mind. And I was just thinking, well, the next time maybe I could send, you know, a really nice golf shirt with our company logo very subtly on the shoulder or something.

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**Stacey Brown Randall:** OK, wait, so I have to interrupt you. When you're doing touch points to your referral sources, you're not allowed to use your logo. No promo swag.

**Jay Berkowitz:** What if I do 10, like instead of 10 golden rules, I just have a 10 on the sleeve?

**Stacey Brown Randall:** I mean, again, it's your business. You get to make that choice. Let me just tell you why I tell folks, don't put your logo on things you're doing for your referral sources.

I teach a concept called platinum principles. And number one, platinum principle is it's got to be all about them, and all about them is not your logo.

So you send me a shirt or a Yeti or a candle or something, and it has your logo on it. That is a gift for you. That is not a gift for me, right? And so you wanna put my logo on it, great. Now it's all about me, right?

I mean, that gets a little complicated if you're doing individual gifts like that. And that's why I don't recommend it. We do this thing called mass personalization within my program so that people can manage sending out personalized gifts but doing it in mass.

So the what you do matters, right? But I do say no promo swag. Have it for your clients, have it for your prospects, but don't make it part of this plan that's there specifically to nurture more referrals from your referral sources. It's got to be about them, and your logo never is.

**Jay Berkowitz:** Awesome.

**Stacey Brown Randall:** Sorry if I bursted your bubble.

**Jay Berkowitz:** Let me quickly try and refresh because these are awesome, Stacey. This was fire.

**Stacey Brown Randall:** Thank you.

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**Jay Berkowitz:** And I'm sure this is going to be one of our top podcasts. So thank you. Number one is defining referrals correctly. And there's two parts that the personal connection and needs identification.

Number two is know where they fit. And you talked about the three legs there, and everybody's focused on the first two legs, the prospecting and the marketing, and they need to know referrals is the third leg.

Number three is how important tracking is, or make tracking sexy, with the name of the golden rule. And I'm going to create my spreadsheet with five parts to it very, very quickly.

And then number four is know the players. There's three players, the source, the prospect, and you.

Numbers five, six, and seven are the three areas of science you need to understand—the happiness trifecta, the psychology of trust, and the behavioral economics. And I'm not going to try to summarize those. I'm going to listen back to this podcast.

And by the way, I listen to every podcast. This is funny. People say, why do you listen to your own podcast? Because when I'm interviewing you, I'm thinking about the next question, I'm taking notes, and when I listen back, I love to and I learn. I think this one's going to be on auto-replay.

Number eight, the referral ecosystem. Referrals are not a nail and not a hammer, but you've got to learn the referral ecosystem.

Number nine is identify the existing sources of magic. I've actually done that exercise, but I haven't done it in a long time, where I looked at, I do track all my sources. I make sure I send a gift, but I haven't done the sort in a while.

And it was interesting. Trade shows were actually our number one source of leads. So I need to do better on referrals without asking. And that's why we're here today.

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And number 10 is the plan. Stacey, this was fantastic. And I know everybody's thinking what I'm thinking. What's a great introduction for you? Who should they be sending your way? I'm allowed to ask that, right?

**Stacey Brown Randall:** Yes, you're allowed to ask that because you're talking on the podcast.

**Jay Berkowitz:** Yeah, OK. Because I honestly mean it and I want people to send you a ton of business.

**Stacey Brown Randall:** Well, I appreciate that. Yeah. And I do work with professional services and creative industries. So attorneys, CPAs, consultants, financial planners, coaches, interior designers and real estate agents.

So those are always great for my programs. My programs don't work for everyone, but those are the programs it does work for.

But having you ask me that question, the specific thing I would say is I have a book coming out this fall. And so the great introductions for me are actually to be on other podcasts, particularly when I can get on those podcasts in October around the time of my second book launching.

And so that would be the best for me is because I want to spread the message about the book and of course move more pre-orders and book sales.

**Jay Berkowitz:** Great. Well, if you'd love to do this again, I'd be very happy to do it again closer to the book launch.

**Stacey Brown Randall:** We'll do the 10 Golden Rules of a Referable Client Experience, which is what the book is on.

**Jay Berkowitz:** As a matter of fact, if you want to do a webinar, we can actually do the video and do the webinar. So let's look for that coming September, October near you. And last question is, where can people get in touch with you?

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**Stacey Brown Randall:** So the website is the best home base, [StaceyBrownRandall.com](http://StaceyBrownRandall.com). Stacey does have an E, but of course my two top favorite social media platforms are LinkedIn and Instagram. So you can find me under Stacey Brown Randall at both of those spots too. That's a great way to connect.

**Jay Berkowitz:** And obviously the folks listening today are podcast listeners. So say the name of the podcast one more time please.

**Stacey Brown Randall:** [Roadmap to Referrals](#).

**Jay Berkowitz:** And if you're kind of a rookie podcast person, what I always do, I just, iTunes is my go-to podcast platform or YouTube's actually just as good these days. And so you just have to put in Roadmap to Referrals, and it'll come up or Stacey Brown Randall.

Stacey, this was really fantastic. I'm definitely relistening and taking notes. So thank you so much for your time and your expertise today.

**Stacey Brown Randall:** Thank you, Jay, for having me. It was so fun.

**Jay Berkowitz:** Hi, Jay Berkowitz again. Thanks for joining me and Stacey on my podcast takeover on the Roadmap to Referrals podcast.

If you enjoy this format, I hope you'll visit my podcast, [The 10 Golden Rules of Internet Marketing for Law Firms](#), and connect with me at [tengoldenrules.com](http://tengoldenrules.com), or watch our videos on iTunes or our YouTube channel. Over a million viewers can't be that wrong.

All of the links to connect with me can be found below this video or on the show notes page of the episode. Now, back to Stacey.

**Stacey Brown Randall:** I hope you enjoyed this episode. And don't forget to show our guest host some love by checking out Jay's podcast and more information on his business.

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You can find everything you need to learn more about Jay at the show notes page for this episode, which is [StaceyBrownRandall.com/366](https://StaceyBrownRandall.com/366).

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