

Ep #377: When You Identify Your “Who”



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. I'm your host, Stacey Brown Randall.

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More than a decade ago, I developed a science-backed framework and methodology to generate referrals without asking. As I've refined it, I have had the privilege to help thousands of small business owners take control of their referrals on their terms. Join me every week as I break it down for you.

Okay, so last week on the podcast, this would be [episode 376](#). It was the setup, the how to do it, when it comes to identifying your who. And the who we are talking about are your existing referral sources.

So if you haven't yet listened to [episode 376](#), then I'm gonna encourage you to go back, listen to that episode, because I walk you through the three steps. And remember, we do two rounds of it.

Each round's a little bit different. but the three steps within the two rounds of how to correctly identify the people who are referring you now or who have referred you in the last couple of years.

And we call those folks your existing referral sources. So knowing who those people are really, really matters.

So here's my question for you. Did you do it? Did you go through the process of identifying your existing referral sources? I'm gonna keep my fingers crossed that you did. I know you did. I have faith in you.

But if you didn't, if you haven't yet done it and you're still like, oh, it's gonna take work. Yes, most things good in life do. You're like, oh, it's gonna take work, I just gotta make time for it. I totally get that, right?

So this episode is all about providing you with the encouragement that you may need to go through the process and identify who your existing referral sources are, okay?

So this is what I did to encourage you. I hope you enjoy it. I pulled previous episodes where I have in the past interviewed other small business owners. They're just like you, my friend.

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And I interviewed them. All of them are clients in one shape or form, have been clients with me over the years. And I pulled the moments in their interviews where they shared insight, and they gave their perspective on what it was like and how they felt about when they finally identified their existing referral sources.

So I thought if you're struggling to make time and space to go through this process of identifying your existing referral sources, maybe hearing another business owner talk about it would give you some of the encouragement that you need.

So this is encouragement from business owners like you who have actually gone before you. They have done the data gathering. They know who their existing referral sources are with laser focus, clarity.

And sometimes I think hearing from other business owners talk about taking the time to do the task is way more valuable than you listening to me preach about it or get on a soapbox about it every couple of episodes.

So I respect the fact that hearing other business owners who have worked with me, who have done what I've said, who have done what I've asked, that sometimes their words just matter way more than mine. So we're going to have a chance to listen to what they have to say.

So what I wanted to do is I didn't just want to pull interviews from the clients, like the most recent client interviews I've done. I could do that. I could go back, and I could pull some interviews.

I could pull like, you know, four or five of them from this year, or maybe like the end part of last year and run those clips. But I wanted you to hear the longevity behind why business owners do this task of identifying their existing referral sources and why it hasn't changed.

Now, I didn't go back and pull episodes all the way back from the very beginning of the podcast, like back in 2018. I was like, okay, we don't have

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to go all the way back there. I mean, it feels so long ago, doesn't it? So much has changed in this world.

So I started out, I was like, okay, we don't have to go all the way back. Let's just go a couple of years into the podcast and pull interviews that I've done. So I've taken one from a couple of different years.

So the first one you're gonna hear is David Ferguson. David is an amazing, amazing alumni client of mine. His interview is with him in 2021.

So you're not gonna hear the backstory of like when he started with me, what his results, like what it looked like before he started working with me, what he thinks about referrals, what results did he have in his first year and his second year.

You'll have to go back and listen to the episode if you want all of that. What we've done is we've gone in and we've spliced out where he's talking about how it felt when he really sat down and went through the process that I walked you through last episode, [376](#), of identifying his existing referral sources and what that meant. So now let's hear from David.

Stacey Brown Randall: Okay, David, so I know this was a couple of years ago for you, but do you remember the first time in the beginning of 2019, when you went through the process of identifying your existing or your current referral sources?

David Ferguson: Yes, absolutely. I do, Stacey.

Stacey Brown Randall: So tell me what that was like for you that very first time going through that process.

Because I remember when we sat down and we went through your list of referral sources, you had actually identified 36 referral sources. And then when we were done with the process that I walk people through, we actually had 12 active referral sources.

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So I know it was a little bit about, wait a minute, that number's a lot lower. So tell folks who are listening, who were considering like, okay, I need to get serious. I need to get real about who my referral sources are.

Tell them what it was kind of like for you going through that process and kind of like how it opened your eyes or what it made you think.

David Ferguson: Probably one of the first aha moments to me was understanding what a referral is, and being very, very clear that a lot of the things or a lot of things that I thought had been referrals weren't actually referrals. And they were just sort of introductions, or I forgot the other term you reference.

Stacey Brown Randall: Word of mouth.

David Ferguson: Word of mouth, exactly. And so what your process did for me was really bring it, narrow the focus and be very clear about what a true referral is.

And so, yes, I do vividly remember that process and the long list that I that I had of what I thought were referrals and then sort of being able to break that down and actually getting behind who they are and how they actually came to me.

So thinking of sort of my client base and sort of stepping back to say, how did I get to them? And then who were those people that sort of made those referrals? And what were the circumstances around that?

And that to me was very, very empowering, quite honestly, because it helped me crystallize. In this business, you quickly realize that you are as good as your next referral.

And so if you stop getting referrals, you die. And so it is imperative that you continue to nurture that. And this process was one that really helped me get that kick started and moving in the right direction.

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Stacey Brown Randall: Like you said, it was very empowering. And that's actually very common language that I hear. It's like, people are like, it's very empowering. It's like, I finally feel like I'm in the driver's seat of who my real referral sources are and I can look at this differently.

And you know, for some folks, it's an exciting process to go through because then they realize, wow, I have all these referral sources. And then for others, it's a little disappointing because they thought they had a bunch and then they realized they don't, but it's always eye-opening.

David Ferguson: And to be honest, Stacey, I mean, you know a little bit about my background and I've had a lot of years of sales, quote unquote, sales training and all types of sales training and how you're supposed to be, ask for the referral and all those little tricks in the trade and that kind of stuff.

But for whatever reason, I always just fundamentally inside me, it just didn't feel comfortable with that process. And so when I connected with you and quite honestly saw your book and said, hey, this makes sense. And then I happen to know this author. So let me reach out there.

So I did, and understood what it is that you were really, because it connected to me on a much more than superficial level. It was a deeper way.

I've always felt there's got to be a better way to do this. And you really, I think, hit that nerve for me and helped me understand that there is a process to it. And by mastering that process, indeed can get me to where I need to be when it comes to referrals and expanding my business.

Stacey Brown Randall: Oh, I hope that was so encouraging for you. I really think that when David talks about how knowing who's referred you is so empowering, that is like one of the most perfect words to use to describe what it feels like after you do this process of identifying your existing referral sources.

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Now I'm going to take you to an interview that we did in 2022. And this previous, or alumni client, is Jack Tompkins. And he is a self-described data nerd. He's actually really brilliant. I would call him more like, I don't know, he uses the term nerd. I prefer like genius or guru when it comes to all things data and metrics.

And he actually went through, so this is back in 2022, so this was after he was getting started with the program, and he went through the entire process. The same one that I'm teaching you guys that's coming up in September for the More Referrals Masterclass.

This is what you'll hear Jack reference in his little snippet that we pulled out. But now I want you to hear from Jack. And this was from 2022. This is [episode 204](#). You can hear the whole episode if you want to.

We're gonna link to all these episodes in the show notes page for this episode. Real quick, let me just give you that link right now so you don't have to remember any of these numbers I'm giving you. One-stop shopping, so to speak, with our show notes page. Just go to StaceyBrownRandall.com/377. Don't forget, Stacey has an E.

Alright, so now let's listen to how Jack describes what it was like identifying his referral sources. Let's just say the word cool and awesome are used.

Jack Tompkins: So it's been really cool, right? It's, one of the biggest things that really jumped out to me, and this is, I forget which, but it was probably module one. I think it was even in the definition stage, but what is a referral?

And that like that hit home right off the bat, because I've been tracking referrals pretty much since I started the business, and my definition has now changed, right? And it was, oh man, somebody made a connection for me, which I now know is not really referral.

It's very different looking at it with this person sent me a connection who needs what I do right now, right? And I forget all the criteria, but-

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Stacey Brown Randall: You nailed it.

Jack Tompkins: Oh, perfect, okay.

Stacey Brown Randall: Yeah, they connected you and there was a need identified.

Jack Tompkins: Perfect. Okay. Yeah. So it's very different looking at it through that lens versus, hey, somebody just did a blank email intro or, hey, you should connect with this person. Here's their contact info. Right?

Very different ways to look at it. And when I look at now kind of the stage that I'm at in the program. It has transferred and carried its way through because now I'm identifying, or I have identified referral partners, which has been really, really exciting to see, oh, wow, these people actually give me business. That's really cool.

And I know kind of the right criteria to look at them. So it's been great, honestly, from a data perspective too, but obviously from a business perspective, what do those things mean and how do they translate to business or how do they translate to revenue or new clients or anything like that? It has changed a lot of my overall marketing strategy, honestly.

Stacey Brown Randall: OK, excellent. I hope that you found encouragement as well in Jack's little snippet of what he was saying about identifying existing referral sources. Next up is Melanie Shaffer.

Melanie was a client actually more recently. So this interview is from 2024. And she is going to talk about really how understanding who her referral sources are, those existing referral sources, how it saved her time.

Again, you can go and listen to her interview if you want to hear everything she has to say. All these interviews, they talk more about just identifying their existing referral sources. They talk about other things that they learned and what mattered to them and what results and stuff they saw.

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But here's what Melanie talks about, why it was so important for her to identify and know who her existing referral sources were. So here is Melanie's clip.

Melanie Shaffer: 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 summer with a teabag and instructions on how to make an iced tea in Texas, right? 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.

Stacey Brown Randall: All right, I hope you enjoyed listening to Melanie talk about the saving of time and really what was in it for her when it came to really knowing who her existing referral sources are.

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Okay, so this is the last clip I want you to hear from. This is from Richard Carlton. So Richard, his episode actually hasn't even gone live yet. So his episode's coming up in a couple of weeks, maybe, maybe a week or two. Don't quote me on that.

I believe it's coming up like the second week of September, but Richard Carlton handles business development for a company called Inspiring HR.

His CEO, Mindy Flanagan was also on the interview. So they're both on the interview. You're just going to hear the clip from Richard though, because he's the one that speaks directly to this, but both of them were on and we had Mindy and Richard.

Richard participated in the accelerator program. So a little bit different from being like in the coaching program, but Richard participated in the February 2025 Referral Accelerator.

And so we have an interview coming up that he and Mindy are both on talking about all the things that they learned and did and are now putting in place because they participate in the accelerator.

But when he said this, I was like, Oh, I know this episode won't even be live when people hear it. But I think it's important for folks to hear what he has to say.

So we went into the raw files because we don't even have the official file yet for you. Because this episode won't be live for a couple weeks, but we went into the raw file and I say we, I mean it was not me, let's be honest, the team went into the raw file and pulled out Richard's response to this.

Because, like Melanie and Jack and David, he's saying the same thing about the power behind knowing who your existing referral sources are. And he's saying this from doing it this year.

So now you have a number of years, like a number of different types of business owners from different years going through this same process and

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sharing how powerful it was. So there is longevity and power in this process. So let's hear what Richard has to say.

Richard Carlton: The first aha moment was some of the work that we did in that pre-assessment type of actually going through and recording and data. And I think I sent you the note saying, I learned a lot about us and myself about what we were missing.

We had individuals who had referred who I'd forgotten had even referred any business to us. So that became an aha moment that we needed to collect that data to see where we were, and then it will make it easier in the systematic approach to keep that data going so you know later whether you're being successful or not.

So that was one of the aha moments. I think the other was that in our business, we had been using a CRM but not fully utilizing it in ways that we felt like it could be to their best advantage.

And after your program, and we did, it took us a while. I mean, it wasn't something overnight, pushing around a little bit with Mindy and others on our team.

We have created where we know who our referral sources are, and now we'll be able to track more easily who is providing referrals and how often they're doing it. And then, as you have put in the program, the touch points that are necessary to keep referrals coming.

Stacey Brown Randall: I hope that you enjoyed the snippets from my clients who learned the same strategy, because everybody I work with does this.

Now, a lot of the times when you work with me, whether it's the Accelerator, VIP, or the coaching program, you identifying your existing referral sources is actually part of your pre-work.

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And like I said before, I know that those programs aren't the right first step for everybody. And for some folks, you just need one strategy to get you started.

And if you have people referring you, the strategy you need is the one that I am teaching in my More Referrals Masterclass.

So that same strategy you just heard Melanie and Richard and David and Jack talk about was so amazing, not only identifying their existing referral sources, but then knowing what to do to cultivate more referrals from them.

All of that I am teaching in the More Referrals Masterclass, and it starts September 9th. So you're running out of time to grab your seat.

So your assignment, if you choose to accept it, my friend, is to go identify who your existing referral sources are, or wait, join the masterclass, and in the first class, I'll walk you through how to do it.

And I'll give you some parameters that really weren't a part of the episode last week, and we'll do it with a more laser-focused approach, and I'll be able to answer questions you have, because there's always questions once you identify your existing referral sources.

So come to the class to do it. Do it before you come to the class. Either way, you're going to get it done. You're going to identify your existing referral sources.

And then if you do snag your seat inside the More Referrals Masterclass, then you're going to learn what the heck do you do with these folks, these existing referral sources?

How do you take care of them? What do you say? What is the cadence? All the things you need to know to create and develop more referrals from them.

So when you join the masterclass, I want to be really clear about this. This is exactly what you're going to want away with, right?

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Number one, you're going to walk away with a fully built outreach plan of five to seven touch points for your existing referral sources. And that plan will span those five to seven touch points will actually span over a full 12 months. So it's a one-year plan.

You are also going to walk away with proven scripts to use for specific touch points and some recommended touch points. So you're going to feel confident that you are planting referral seeds with authenticity and that you're getting it right.

The third thing you're going to walk away from this masterclass is it's a plug and play dashboard so that you can keep track of your existing referral sources, all the information you need on them, plus your outreach plan, plus the language.

We're going to keep all in one place. We're going to make it nice and easy. It's going to be built for you. You're going to have the template, and you just got to plug in your information.

Okay, the fourth thing you're gonna walk away with is you're gonna actually understand the three-part referral seed formula that I teach all of my clients so that you can create your own referral seed language in the future.

The fifth thing you're gonna walk away with is ideas for future touch points. So you can change up this outreach plan for your existing referral sources as desired.

Because remember, this plan you're building, this five to seven touch point outreach plan for 12 months, you should be running it every year in your business.

And that means in year two or four or nine, you may wanna change up some touch points and you'll have some ideas on exactly what that looks like for yourself.

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And then, of course, the sixth thing you're going to walk away with is a referral tracking system plus suggestions on how to incorporate this tracking within the CRM that you're using, regardless of what CRM you use.

I am software agnostic. It doesn't matter to me what software you use. It doesn't matter to me if you use an Excel spreadsheet, as long as you're tracking.

But I will walk you through recommendations of what you need to modify, potentially, in your CRM so that your tracking is really easy. So you're always making sure you're capturing the right information.

So those are the six things you're going to walk away from when you join this masterclass. It's the More Referrals Masterclass. It is coming up. It is starting the second week of September.

You want to get your spot. They are three live classes. Of course, we have the recordings as well if you miss a class. And there's a bonus fourth class where all I'm going to be doing is reviewing people's work and answering questions.

So we've got these four classes coming up and it's going to be over before September is over. So you need to get in and grab your seat while you can.

But just think, in less than a couple of hours, you'll start taking action to generate more referrals from those who have already referred you before.

And like I said, with this one strategy, it really is a wash, rinse and repeat model that you can use for years to come to keep taking care of and cultivating, keep taking care of your referral sources and keep cultivating referrals from them.

So if you've ever felt like you are leaving potential referrals on the table, but not just like, you know, you don't have a system, it's definitely not built on the science of referrals and you want to feel good doing it, right?

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That calm certainty of knowing how you're doing it, what you're doing, and what you're saying is going to be right, will work, and will feel good. That's important.

But if you feel like you're leaving potential referrals on the table because you don't have a system, you're not cultivating your existing referral sources, you don't know what to do, you don't know what to say, all you need is to dedicate a few hours to go through the masterclass so you can build momentum and start receiving more referrals.

That's right. Get more of your clients through referrals.

This is a virtual masterclass. It starts September 9th. So time is of the essence. The clock is ticking to register. It's going to be held over three live virtual sessions. Plus, like I mentioned, the bonus Q&A session.

So where do you go to register for the More Referrals Masterclass? staceybrownrandall.com/morereferrals or of course you can just go to the show notes page for this episode you can find the show notes page for this episode at staceybrownrandall.com/377.

On the show notes page, you'll of course get the links to the full episodes from the snippets that you heard, you'll find the master class registration link, and of course this transcript for this episode.

Okay, so you're empowered. You know why it's important. You've heard from other business owners telling you, yes, you need to go identify your referral sources.

You're going back to the last week's [episode 376](#) and you're reminding yourself of how to do it. And then you're snagging your seat in the master class to either do the work and then also to show up to know how to take care of these people, learn the entire system start to finish.

You're doing all of that and you're ready to go.

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Alright, thanks for making it to the end of this episode. Until next week, take control of your referrals and build a referable business. Bye for now.