



Full Episode Transcript

With Your Host

Stacey Brown Randall

Stacey Brown Randall: Hey there, it's Stacey. For this episode, we have a special guest host. Enjoy.

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

Ep #427: Why Great Service Doesn't Automatically Generate Referrals

Kelly Brubaker: Hi, I'm Kelly Brubaker from the Your Profitable Law Firm podcast. And today I'm taking over Stacey's Roadmap to Referrals podcast. We're sharing an interview that I did with Stacey on my show.

We talked about why doing great work is simply not enough to get referrals. And honestly, it really resonated with me, all the things that I'm doing wrong.

If you've been waiting for the phone to ring because you're really good at what you do, this conversation is going to change how you think about building your law firm. Enjoy.

Kelly Brubaker: So Stacey, I am so excited. We've been chatting and we've met in a networking group. And so we just started chatting offline.

I think we were in one of the breakout rooms and then started chatting offline. And I'm like, dude, seriously, you've got to come on the podcast.

I have to admit, a lot of my podcast episodes, I genuinely am interested in the content and who I'm talking to, but this one is going to be very personal for me. I just want to like download all your knowledge.

Stacey Brown Randall: I'm here for it. It's interesting. I think a lot of my podcast hosts where I'm on the show with them, they're like, I know my audience is going to get a lot out of this, but I'm really here for myself because of everything I can get. So I'm here for it.

Kelly Brubaker: Oh my God. Okay. So let's talk. Well, first I want to talk about your book because I know you get the book and so let's talk. So title, summarize it for me. Let's talk about your book.

Stacey Brown Randall: Yeah, so this is actually my second book. That's the most recent one that was published towards the end of 2025. It's called the Referrable Client Experience.

And it really looks at, so I always tell my clients that when we start considering how we're going to get more referrals, and I know we're going

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to get into how I do referrals, which is without asking or compensating or having to be networking all the time or gimmicky and promotional.

The way that I talk to my clients about referrals is like, you should always be paying attention to it with people who can or should be referring. And that's three groups of humans, really.

And that's the people who already refer you. And that's what my first book is on, is understanding like people who already refer you, a little easier to get them to keep referring you, but you still got to have a process in place.

The next group are the people who are not referring you now and you wish they were. We call those potential referral sources. So our first group is existing referral sources. Our second group is potential referral sources. And then the third group is actually the client experience.

And there may be people you identify that you're like, I want these four clients to refer me. And so they may more likely fit in that second group of potential referral sources named, like, we know who these people are, right?

But all of your clients, right, whereas not all of them will refer, you should have a process in place within that client experience that makes you referable. And then you understand how to close the gap or bridge the gap to actually receiving referrals.

So my second book, *The Referrable Client Experience*, is the things you should do to first be referable. And then to second is to make sure you know how to bridge the gap to receive those referrals.

Because the ugly truth about client experience is that people will say, well, just do great work, Kelly, and then you'll get some referrals. And you will get some, but you will not get them consistently. You will not get the volume that you want.

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And the truth is doing great work doesn't equal referrals. Because if it did, you and I would be drowning in referrals, as would all of your listeners, right?

But most people are not drowning in referrals. And they're like, wait, so doing great work doesn't mean I'll get referrals.

And like, no, there's actually things you need to have in place while a client is working with you, that percolates the idea of referrals, but that first starts with actually being worthy of getting those referrals, like being referable. And so the book tackles both parts.

Kelly Brubaker: I love that. And I will admit, I've not yet read your book. I will get it because, I mean, these are the things that I need. I'm horrible.

I mean, as a CPA, I'm a very typical accountant, like stick me in a room and I gravitate to the corner. And it's horrible.

And I do speaking engagements, most of them are online, but I do some in person. And when I do an in-person event, somebody will say, you know, hey, I heard you say, you know, at some point that you're a wallflower.

And I'm like, Oh, totally. And they're like, No, you're not. I'm like, Oh, no, because I'm gonna go sit in my room after this.

Stacey Brown Randall: And you know what's interesting too is, and I'm kind of glad you brought that up, because a lot of people think that, well, referrals are just easier for the extroverts, right?

They're just easier for people who are like just naturally out there and having a ton of conversations. And the truth is, it doesn't matter your personality type.

It doesn't matter if you're an introvert or an extrovert, because that's not like knowing a ton of people. is not where referrals come from.

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So while it's, you know, I am, I would say, when I was younger, I was definitely more of an extrovert. And then I got older. And I was like, maybe I want to be more of an introvert.

You know, it can be a little exhausting. And so from that perspective, people are always like, Oh, well, referrals work for you, Stacey, because you're an extrovert, you've got this personality, and you're like, not afraid to be on and like having all this energy.

And I'm like, yeah, well, when we're done, I'm probably going to go like watch some Netflix. So like at the end of the day referrals aren't personality based.

And I think that's important for people to hear. It's one thing I always tell folks I'm like introvert, extrovert, ambivert, you know, whatever you kind of refer to yourself as.

Doesn't matter your Enneagram number, doesn't matter your Myers-Briggs, your DISC, it doesn't matter.

Like, referrals work for you, but you have to create a system where they will work for you, but you have to create a system where you'll work it. And that means the system, the process, the engine, so to speak, has got to be built in a way that you'll do the work.

Kelly Brubaker: Yeah. And I think that's where I struggle, because I'm definitely on board with you.

If I go back and look through all of my clients, my best clients came from referrals. My easiest to close clients came from referrals. So I'm all on board with referrals.

And I know, I mean, we were talking before we started recording, and I shared that I'm divorced, and that's not a secret. So I've used lawyers, like I've had to hire lawyers.

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And for me, and that was not the only, unfortunately, the only, I needed an attorney, but whenever I've needed an attorney, I have asked my attorney friends.

Hey, I'm not asking you, because this is personal, or even if it was business, but I'm not asking to hire you because I know it's not your practice area, or it'll be too personal, whatever.

And I'm not looking for a deal, none of that. I just need, this is my issue, who is the best to serve me right now?

Stacey Brown Randall: Yeah. And you're like 80 something percent of most humans that decide when they have to make a high-stakes decision. And that's what I tell my clients. I don't work with the person who like it cost a couple hundred bucks to work with you.

I mean, the clients that I work with nine times out of 10, they're either working with their clients and it's a high-stakes situation. or it's a high dollar investment situation.

So in your case, when you're looking for a divorce attorney or you're looking for, you know, a contract negotiation attorney or whatever it is, right? I think the statistic kind of fluctuates every year.

It's a little bit different, but it's somewhere between like 83 and 89% of everybody, like that many folks actually want to make the decision of who they hire because somebody else told them, I trust this person and you should hire them.

They want to make that high-stakes or that high-investment decision because of somebody else's recommendation and referral.

And that's what people, I think sometimes like instinctively know, but then they don't know there's actually a way to put processes and procedures and strategies behind it to actually make it work consistently inside your business. But the odds are always in our favor.

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I mean, if 89% of folks want to make a decision of who to hire and they want someone else to tell them this is the right choice, like, why wouldn't you lean into knowing that you've got people who are out there who can refer you from that perspective? Because people want that.

Kelly Brubaker: Right. I mean, I see. So I got to a point where I shut off pretty much most of my social media.

But then I was dumb enough that I'm part of the PTA and I was like, oh, I'll do communications this year, which puts me on Facebook and Instagram that I was trying to get off of.

So unfortunately, sometimes I have to log in and I start to see, you know, I'll see on my feed, there'll be some posts from a local group. Oh, who has a dentist that I can go to? Who has a doctor? I need a GP. I need a divorce attorney. I need blah, blah, blah, whatever.

And I'm always leery of those. I mean, I get it, but now you're getting, there's no context to it. You're just saying I need a divorce attorney.

And then all of a sudden, you've got all these comments, and you don't know really where they're coming from and it's just people and yes, they're your neighbors, but maybe, but not necessarily.

So, I mean, I just feel better when I hear, you know, because you'll get the one, go to this dentist and then somebody else is like, oh, they suck. You're like, oh my God, now, I don't know.

Stacey Brown Randall: You know, it's interesting. So I get those questions from my clients too, right?

Like, and I'm always amazed at the person who, like when it's a high-stakes or a high investment, like maybe the dentist for most folks isn't high stakes and isn't high investment. So maybe it doesn't matter.

But like the person is like, I need a divorce attorney. Like what? I mean, you must be brand new to a city and know no one to make that decision.

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And I do think that social media has crowdsourced, has normalized this idea of crowdsourcing decisions that we make. And so I think it's an interesting look at human society in general when people post those kinds of things.

But what I find really interesting is, so my clients will ask me about that. They're like, well, is this a referral if I get mentioned? I'm like, you can certainly treat it like a referral.

But I have a theory, and this is a theory of just watching this unfold for the last, I don't know, two decades or so, whatever, on social media and like being in those groups and like watching people.

And then like with the people who come back around and say like who they ended up picking. My theory to that is, is that if somebody's posting it like that, they're either in a moment of feelings like I have got to solve this problem right now.

And instead of taking a beat and thinking who do I want to go ask to help me solve this problem, they're like, oh the Facebook will just make it easier so I can just put this.

And then what they don't realize is they're about to get 30 different recommendations, right, different ideas, different possibilities, which is going to be super overwhelming.

So my theory is this, my theory is, is it doesn't matter how many people post, they look for who they know.

Oh, Kelly posted about that dentist. I know Kelly. I like Kelly. They transfer the trust. And so they call that dentist. It doesn't matter that another dentist was listed like 15 times and your dentist was listed like twice. They'll be like, I know Kelly.

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I still think, again, this is a theory. This has not been proven. I'm not going to take the time to figure out if I'm right. I don't care that much. I mean, I care.

But I do believe that I'm right, because I know I've done it in the past for little things that don't matter as much. I'm like, oh, wait, I know Meredith. OK, cool. Oh, wait, I know Paul. So I will go with the people that I know. I'll go with their recommendation first.

Or if I don't know anybody who's posting in those groups like that, I'll go with the person who's mentioned the most. But that doesn't actually mean they're the best for my situation.

Kelly Brubaker: No, and I agree. I totally agree with that. So, okay. I know from my experience, you know, I'll ask people I trust for recommendations, but on the flip side as a business owner, and I'm so horrible with this.

Okay. I've had my accounting firm for 20 years. And I can remember back, you know, probably by about year three, I'm like, oh my gosh. In the beginning, I thought, oh, I'll remember every single person I meet, every single person.

I'll know every client I've ever worked with. I'll know everything about their situation. And then by about year three, that was about when I started having kids. And then all of a sudden, I'm like, oh my God.

Well, my business exploded. I had like the first two years where I doubled like every couple months. It was insanity.

And so I very quickly, you know, relatively speaking three years, but I relatively quickly hit a point where I'm like, oh my gosh. So I ran out and at the time ACT was like the CRM.

And so I'm so excited. I came back in the office, and I told my team, I'm like, oh, I've got this amazing program. We're going to get all of our clients

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loaded in here all of our leads. We're going to track everything. It's gonna be so amazing.

By the time I got it set up. did not have the time to maintain it. And it didn't work how it was supposed to. And because I had at the time I was installing like the first VoIP phone, and it was supposed to pop up the screen.

So when somebody called, it would pop up and it never worked. And then I'd get mad and I'm like, oh, this was supposed to be easier. So, you know, I used it for like, you know, not very long and then trashed it.

And then tried to use spreadsheets and kept changing. Now I just changed again. Again, oh my God, I mean seriously in 20 years I don't know how many different CRMs I've used, but now I am on Nimble, which I actually think is going to work.

I'm good at this but my problem is using it. So let's talk about systems.

Stacey Brown Randall: The system piece is so important. Okay first let me just say like you're talking about like ACT and then I'm like oh my God, Kelly, you're making us old.

So the fact that we both know what those are and have used them in the past. If you've got some folks in their 20s, listening to this. They're like this younger attorney that's just started their own firm. And they're like, Lord, those ladies are old.

Kelly Brubaker: Hey, well, I gave you an out, because you didn't have to acknowledge knowing what it was.

Stacey Brown Randall: I'm not going to leave you hanging out there by yourself when I clearly know what it is. I remember working in one of my corporate jobs. They used ACT, and I was like, this is a nightmare. Like, everything about this is a nightmare.

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And you know, when I started my business, I am probably on my third CRM. But I've been on it since 2018, and you will have to remove me from it kicking and screaming.

Not because, it is great, and I'm very happy with it, or I wouldn't be using it. Truly wrong. I'd be like, hmmm, but moving them is a nightmare. Like I'm like, just mapping where everything goes, right? Like, no, no, we're not doing that.

Kelly Brubaker: Yeah.

Stacey Brown Randall: So yeah, so the system matters. And here's the thing that I always tell folks, there are processes like, you know, SOPs, right? Your standard operating procedures when you're talking about referrals, that should be like what we call kind of set it and forget it.

Like I say, air quotes around that because you can't really forget anything. So it's like set it and kind of forget it. It should just run. It's just automate and should be more like trust and verify, right?

Kelly Brubaker: Yeah.

Stacey Brown Randall: So the way that I teach referrals to folks, because here's a big misnomer that people have about referrals.

They think that referrals is like a nail and the only solution that they need, the only tool that they need is a hammer. And the truth is referrals live in your firm as an ecosystem.

They're hanging out in all kinds of places, and they need different processes put in place. They don't need you installing a new process every single week for the rest of time.

But they do need some basic ones put into place. And you have to think about them. And I kind of tell folks to think about them in buckets, right?

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So the first bucket is, what are the processes that should be running in your business the minute you receive a referral? So we call these when referrals arrive.

There should be an intake process in place. There should be a tracking process in place. There should be a thank you process in place.

There should be how you follow up with the referral sources. There should be how you follow up with the prospect that was referred. And those things should just happen.

And whether they're happening because they're so fast, they're just mainly happening, but they're happening in the moment, or because there's a template or a process or a checklist or a reminder task that you get that says, hey, it's time to do X, Y, Z, because this happened. Whatever it is, they should just be running in your business.

And then there are ones where, but that's on when referrals arrive. We're not doing anything to make them arrive in those processes. We're just making sure that we are categorizing and capturing all the right information and doing the basics.

Then you should be looking at, like what I call the three plans that your business should be operating from. And these plans aren't things that need you touching it daily or weekly.

And in some cases, only one of the plans needs you touching it monthly. The other ones are as the plan is built, it only may be five times throughout the year.

So that's the other thing I tell folks is we look at the people who can refer and then we have a plan in place that just runs. But when the plan says it's time to do something, we do it.

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Now, whether we outsource it, delegate it, do it ourselves, whatever. We can do all that. But when you build a plan to take care of people who are already referring you, that plan's going to look different.

And the outreach that you're going to be doing, and what you say, and the cadence behind it, and the what you do, that's all crafted specifically for who is referring you now.

You want new people referring you? That one's a little bit more hand-to-hand. Hand-to-hand combat is a terrible way to say it.

But that's a little bit more like, these are people who never thought to refer you. You're going to do a little bit more work to get them to the place where they will consider referring you, and it be their idea to refer you, which is truly what we are ultimately after, because then they'll keep doing it.

Kelly Brubaker: I agree. It's magical. When it's natural, it's magical.

Stacey Brown Randall: It is. That's why we always say generating referrals naturally means you're not asking them to do it, you're not offering them some kind of referral bonus to do it or whatever, and you're not feeling like you're constantly in their face because nobody wants you constantly in their face.

And so then the third one being, of course, that client experience. And that just runs because here's the things we do throughout the client experience. Like, it's no different than sending the agreement you're going to sign for us to start working together.

And the same way that you would do things that may be referral seed in nature. So they're just these plans. And there are other processes that once you build it. We get it to the point where we try to operationalize it as much as we can.

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So we call it process-itzing inside, like, I know it's not a word. It's just something we use internally with my clients. I just like it. I just use that. I've been using it for over a decade now.

And so we try to process-itize everything we can, and we recognize what can be delegated. But we also recognize that referrals come from relationships.

And so there will always be a human connection and there will always be a human touch that has to happen from the person who owns that relationship.

So whether that is in a smaller company, a smaller firm, it's like you, the solo attorney, or it's in a larger firm and you maybe have a community manager person or you have a business development team or something like a marketing person, somebody's got to own those relationships.

And so we look at the things that we put in place in a business, whether I don't care if they're a solo business or if they've got hundreds of people or more on their team, it doesn't matter.

But we focus on it, like what are the processes that need to run when referrals arrive? What are the plans we need to have in place that are going to cultivate more referrals from us?

Then the next bucket we look at, and this is more like know what to say when the situation happens, right? And that's more about like, what do you do when problems arise? Not everybody who refers you is going to refer you an ideal client.

Sometimes they get it wrong, and they get it wrong all the time. And there's a pattern of poor quality.

So I teach my clients, there's a way to have that conversation correctly, and there's a way to blow it.

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And so some of the things are, because this problem happened, I am armed with the language I need to know how to handle that conversation.

So when problems arise, whether it's your closing issue, it's your quality issue, or you're getting a lot of word-of-mouth buzz and introductions that aren't actually referrals or you don't know how to flip them into referrals. That's the tools in your toolbox of like Stacey taught me what to say here.

And so those are like, hey, when that happens, I can recognize it and I know how to pull the tool out of the toolbox in your memory and execute on it.

Then that last bucket, it's like that catch-all. Everything else that doesn't fit into when referrals arrive, the three plans, and when from that perspective, when you're looking at when problems come up.

So if you're looking at those options, the last one is catch-all. It's the social media. Some people are like, can we generate referrals from social media?

I'm like, I would never look at social media as a place where you can generate referrals. It is a place where you can plant referral seeds.

But we usually do it in a way, we're not trying to plant referral seeds with everybody who's gonna see the post, we're trying to do it with the person that we want to see the post. So there's a strategy behind it.

And so, it's looking at it from that perspective, but there's a lot that goes into those three big plans to have like a robust system.

And I always tell folks, when you think about it, you're like, well, that's a lot to put in place. I'm like, well, first of all, you never put everything in place in one minute.

And sometimes things are so much faster than people think.

Kelly Brubaker: Yeah.

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Stacey Brown Randall: It's like, you know, if I'm teaching this to a company and we're going to go, you know, like bucket by bucket, we're going to do it in four or five months and it's going to be in, it's going to be operational, it's going to be done.

And then, and then there's implementation and that piece matters probably more than the learning it. But that's, that's always the next step is like, you then have to keep it going.

Like I have this one bar chart that I show folks and it's an attorney. Her name is Amanda and it is her 11 years of results. And it goes like this.

There's a dip in COVID, and then it goes like this. And it is because she, for 11 years, she's not worked with me for 11 years. I tell folks, she's like, she's not been paying me for 11 years.

But for the first couple, she was putting these in place. She started with one referral source. She got six referrals from an internal referral source person in her firm.

There's four partners in the firm, one referred to her. She was a partner, but that's where her business came from.

She was like, he's going to retire and I have to figure out how to get other people referring to me. And we took her from an average of six referrals from one referral source to 12 referrals in her first six months.

And then that was because she started adding new people to start referring her. And then we took her to 27 referrals and her first full year. So 12 in her first six months. And then the next year started and we're like, okay, let's just look at the next year. And that was 27.

And then she got to the 40s and now she's in the 70s and has been for the last couple of years.

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And that is because when you ask Amanda, I did an episode with her on my podcast. I don't remember. I should know numbers, but I'm in like 400. Yeah, so I don't remember.

But I think she's like, she's like episode like 408 or nine or something like that ([episode 404](#)).

Kelly Brubaker: Okay.

Stacey Brown Randall: But the thing about and I think the title of that episode is like, "A Decade Plus of Referral Growth." And the thing she says in there is, this is just how we run the firm.

She's like, it's how we send out, you know, an LOA, that we do work, like we have all these processes in place for how we actually do the work.

We also have the same processes in place, and we follow them every year for how we generate referrals. It's no different. It's no different than having CRM in place that you use.

Kelly Brubaker: Right. Yes. Cause I'm definitely, yeah. So like getting my CRM set up and going, but then I kind of stopped because I'm like, okay, well wait a minute.

I now have current clients, former clients, potential leads, networking sources, like I have all that into my CRM, and then I'm just like, now what?

So this conversation, now I'm like, okay, now I need to get my act together. So what can we, can you share ideas how to keep in touch with your referral sources?

Stacey Brown Randall: Yeah, so the very first thing I would say is you gotta actually have them categorized correctly.

Kelly Brubaker: Okay.

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Stacey Brown Randall: This is a big, into your bucket, this is a big, in your CRM, you've gotta have tags or categories or labels or whatever your CRM calls them.

But this is a huge miss that I see people make. So there's two big ones when it comes to a CRM.

The first one is, is they're not capturing the right information. So you need to understand when you're actually like bringing in, referrals are coming in. You need to be capturing like, where are they hearing from you?

Like how are they learning about you? That's a really important question. And you need to be able to capture the name. If it's referred to you, you need to be able to capture a name.

Like sometimes I'll look in firms and I'll see, and it doesn't really matter what industry they're in, but I'll see like, this was a referral and that's the tag, right? That's the category.

And then it'll say, this was from a networking event, or this is from a former client that came back around and decided to work with us again.

And I'm like, great, what networking event? They're like, well, I don't know. I'm like, who did the referral? They're like, we don't know.

You have to have that second layer of identification, right? So it's sometimes I tell folks, I'm like, we need to add in another field where we capture a deeper information, right?

And the second piece to that is, so that's like just getting it in there right. And then it's labeling it correctly.

You know, clients, that's one tag, right? which we happen to call alumni clients, right? That's the second tag.

Then you have the existing referral sources, like the active people who are referring you and have been referring you over the last couple of years.

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And then you have the people who are in there that are potential referral sources.

But I always tell my folks, I'm like, before we try to build this into the reminders and the tasks and the things you're going to do in the CRM, we have to build it actually visually first.

So that's one tip I would definitely have, folks. It's like, you need to sit down. You need to look at the next six months. We build everything on a year basis.

So if I started working with somebody in May, we're going to look at this from May of this year till April of next year. Eventually, we're going to move to a calendar year because it'll just be cleaner and easier.

But we metric and measure the heck out of that first year. Because what we're trying to do when I work with clients is we're trying to take them from where they are with their referrals and either double that, triple that, or quadruple that in a year.

Kelly Brubaker: Wow!

Stacey Brown Randall: If we can do it in 90 days, awesome. We do not guarantee that we can do it for everybody in 90 days. And we don't guarantee that it'll happen to everybody in one year.

I had one client I worked with that it didn't happen until the first quarter of his second year. And then he was like, oh, I got everything I wanted to get. And then doubled that. And then it just continued to snowball.

So it does work on its own timetable. These are humans that refer. And sometimes humans, they're squishy. And they don't always do what we want them to do. We have to know that.

So then you have to build out the right plan because how I'm going to take care of people who have already referred me is going to look and sound and be different than people who've never referred me.

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So this is a big question I always get from folks are like, well, I want these people to refer me, and they'll have like a group of like six or seven names or maybe it's like 50 or 60 names. It doesn't really matter.

It depends on the volume that they need. And they'll be like I want these specific people to refer me. And I'm always like, great.

I was like, there's a saying that I have with my clients of how we back into getting those folks to start referring you.

We always say, referrals, before you can be referred, you have to be remembered. To be remembered, you actually have to be impactful and memorable. And to be impactful and memorable, you actually have to be willing to put the other person first. And quite possibly for a long time.

Kelly Brubaker: Yeah.

Stacey Brown Randall: Long time is relative, right? I always tell folks, we're usually looking at this at a maximum of a year. We're hoping they'll refer before that year is up, but some people won't.

I always tell folks, when you are looking at people you want to refer you, you're going to kiss a lot of frogs before you meet the princes and the princesses that are ultimately going to refer.

And that's because there's a whole piece of science behind referrals and all these things that happen with why referrals happen to begin with.

But if you're looking at getting referrals, and you have to know you have to be remembered. And before you can be remembered, you know you have to be memorable or impactful. And you know that comes from putting people first.

Like the system I always tell folks to put together internally, we call it the running five, keeping warm. But I was like, I'm like, you don't need to like try to cultivate 30 people in a month and try to do that every month.

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But you probably need like 3, 4, 5, less than double digits. So the five number in running five is obtuse. It's just the number we used to call it, but everybody picks their own.

I have a running four, I have a running eight, I have a running nine.

Kelly Brubaker: Okay.

Stacey Brown Randall: We're trying to cultivate a small group of folks every month. And that cultivation always starts with like a conversation because this is a relationship.

And in that conversation, I'm going to make it about you. I'm going to be listening for ways that I can help you.

And yes, there's probably some other things I'm going to be doing. And we call it my secret sauce of how we learn to plant referral seeds in those moments.

But the idea is, is that we're going to focus on them. We're going to remove the outcome of we want referrals. We know that's what we want.

But we're gonna remove the outcome from it coming from any particular conversation or any particular follow-up. And then we just have to organize the system behind it.

So once you have a first conversation and you move them to keeping warm, you know what the strategy looks like to do keeping warm.

And we do this thing called mass personalization. So it's like, you're gonna do the same thing to everybody on the list.

We're gonna pick the right thing so that it feels personalized when they receive it, regardless that you're doing the same thing for everybody.

Kelly Brubaker: Right. Right.

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Stacey Brown Randall: There's a little bit of a finesse to that and to what we pick when we're doing kind of like the keeping warm and the really just staying in front of those folks, staying connected to those folks.

But not monthly where it's creepy, not in a way where it's so easy, you're pushing a button and having some robots send a card for you every month. Like we don't do any of those things.

So it takes a little bit of time but think about it. If your average client is worth \$5,000, or \$15,000, or in some cases, my clients, they're worth \$50,000 or \$100,000, you should be willing to put the time and energy in to get that person to start referring you the first time.

And then you continue to cultivate them now with the rest of the people who are referring you, and what if they started giving you five referrals in a year, and they're worth \$25,000?

Like it's worth the energy you're going to put it up front to get to the point where now you have somebody who is referring you and you're nurturing consistent referrals from them.

I mean, like I had one client was like, I brought in a million dollars in referral revenue last year. I'm like, yeah, because you consistently follow the process.

Kelly Brubaker: That's awesome.

Stacey Brown Randall: Right. She didn't make \$1,000 from each client, right? And so it wasn't like she brought in that many clients to get to a million dollars in referral revenue.

You know, most of her clients are going to be definitely north of 50, but usually north of six figures, right?

And so, you know, from that perspective, but like putting in the time and energy is worth it once you can get the system going, because then the system starts to feed itself.

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Kelly Brubaker: Yeah. And I think the hard part, like anything else in life, when you start something, if you don't get that instant win, it's so hard.

Stacey Brown Randall: I know. And we know better. We're grown adults. We know better. We know how instant gratification works.

We know that most social media and the internet is out there as weapons of mass distraction. We know that.

I just saw a study come out that was about, like, the clickbait headlines have never been worse. They are void of all value.

You're not, you don't know anything you're gonna learn when you click on that headline, right? Which means it's, so we're like, we're feeding it, right?

Like a society, a marketplace that is after the fast win. And the truth is referrals are not an algorithm.

This is not, referrals are not an algorithm that you can manipulate. Referrals come from relationships, they come from humans and people.

And it's why they're the best type of clients that we want. We want clients referred to us, like you said at the beginning, they're easier to close, they're quicker to close, they're less price sensitive, they show up already trusting you.

But to get them to that place, you have to do some work. It's no different than logging into your CRM and pushing buttons to make it work for you, too.

It's like, I always tell folks, I'm like, listen, you're a grownup. You get to decide what you're going to take your time to invest in or not.

But don't come complaining to me when you're not getting referrals. And I'll be like, what are you doing for it? And you're like, well, nothing.

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Because I'm not selling a magic button. And I'm not selling a silver bullet. Like, that's not what this looks like.

Kelly Brubaker: Exactly. And I tell clients the same thing. Like if you're coming to me, like I get it. If you're coming to me, you probably have cashflow problems. You know, something's not right.

You know, no money in the bank, whatever, but I'm not going to be the magic bullet. I'm not the quick fix. Like we're going to have to spend some time.

And so, so I know I struggle, you know, I struggle to sell that, but I struggle as hearing it too. Like when I'm trying to buy something, right?

Stacey Brown Randall: Right. Same, I'm like, think about anybody else in your world that you hire, you're like, can't you just push a button and get the answer. And they're like, can you push a button and get the answer for your clients? You're like, Oh, right. No.

Kelly Brubaker: Oh my goodness. So I love all of this. I mean, so definitely, if we're talking about, we're going to start, we're going to put a system in place, what would be like frequency?

Because I think that's probably like the last thing in my mind. I kind of have ideas on how to keep in touch with people in their different buckets, but like, what would be a good, because you're right, like every month would be creepy, but is quarterly, is that too long to go? Like what would be just a frequency?

Stacey Brown Randall: Yeah, so if you're talking about your existing referral sources, right, the people who already refer you, that shifts what we can do and what we can say. So we get to do it a little less.

So I usually tell folks it's going to be five, six, maybe seven times throughout a course of a year of 12 months. And there would be a really good argument for why you would do seven.

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I used to say four to eight, but the truth is over 13 years of doing this with clients, I really see that it comes down to most folks hit the six, right? They're right around that five to six. Sometimes they're seven. It just depends.

There's this thing you can do called clustering of touch points certain times of years where it's not a big deal that touch points are close together. But five, six, or seven is for people who already refer you.

For new people that you want to start referring you, you first have to start with that first conversation. Whether it's virtual or in person doesn't matter to me. It's still going to start with the first conversation.

And then they're going to move from that running five after that first conversation to the keeping warm, if you decide to keep them.

And that usually we're looking at from that first conversation through keeping them warm for a full year, you're probably doing somewhere around that six to seven, maybe follow-ups.

But those follow-ups look different than what you're doing for the other group, because this group hasn't referred you. So you've got to like, we proceed with a little bit of caution, but we want to make sure that we're doing things that are impactful.

Now some, that doesn't mean everybody, like some people are like, I'm happy if I can just get four or five times in a year, more like I am too. If that's all you're going to do, I'd rather you do that than zero. Right?

Kelly Brubaker: Right.

Stacey Brown Randall: But it's going to take a number of, over that course of the year, it's probably going to take after that first conversation, you know, five, six or seven additional outreaches to the people that you want to refer you because you're focused on always helping them.

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And you see those opportunities to plant referral seeds. With the client experience, that's very different. Typically, what we're looking at is the, you do work. And so we call that work touch points.

We look at the how you do your work for your work touch point perspective. And then we want to infuse in about 20 percent.

If we're looking at it on a scale, we want to infuse in about 20 percent of what we call relationship-based touch points. They may be delivered with a work touch point. They may be like standalone separate.

But those relationship touch points aren't about the work you're doing. It's about your client being seen with the work that they're choosing to do with you.

So it's like, instead of writing a welcome card, it's writing a journey card, right? So the divorce attorney is not saying, thanks for becoming a client, because that's all about you.

And you're like, thanks for becoming a client. I'm going to get money. You're going through a divorce, right?

So what we want to say instead is, we appreciate the opportunity to work with you. We know this journey is going to stretch and challenge you. And we're here by your side, right? That's a relationship touch point.

It's the same type of free card you're writing, and it's handwritten. But we're changing the language to make it more relationship in nature for your client to feel more seen.

Usually, we're looking at about of all the work touch points you do from start to finish, we probably want to infuse I say a handful, but it just depends. But it's usually around 20%.

Now that 20% if you do like 1000 touch points, we're not doing 20% we're going to do way less. I say 20% I'm like, well, it really is depends.

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So, but usually it's like a couple throughout, and we define the client experience as three stages and this is all in the book, *The Referrable Client Experience*, walks you through all of this.

But we talk about like what that looks like, so it really depends on who it is, and what we're doing.

But what I tell folks is you're going to build these three plans, but you're going to build them individually, separately, not parallel.

They will run parallel eventually, but you're going to build them one at a time and get it operational before you move on to the next.

Kelly Brubaker: Okay, that all makes sense. So I feel like I'm a little bit on overload. I'm definitely gonna have to replay this.

I've been taking mental notes and I'm like, no, I already know it's going to be recorded. Um, so, okay. So we've had a wonderful time talking and I don't want to take up too much of your day. I know you got crazy things going on today.

So what would be, we'll definitely put in the show notes, we'll put a link, we'll put a link to the podcast episode you referred to. We'll put a link to your book.

What else, like how would client or potential clients best get in touch with you? Because they're like, oh my God, I heard Stacey, got to get in touch with her. How's the best way?

Stacey Brown Randall: Yeah, you know, here's the thing I would always tell folks, if they're like at that point where they're like dipping their toe in, like this is really interesting. I really love this.

I think the books and my podcast *Roadmap to Referrals*, is really a great place for people to start.

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But when people are like, I want to really understand this, I want to really get more information and they're kind of at that point where like, I want to see if this is truly going to work for me and my business.

We do a free 20-minute teaching every month. It changes days, so I can't say it's the third Thursday because that's not how it works.

So we, not every single month, but just about every month, we do a 20-minute teaching where I take one topic and I go deep on it for 20 minutes and we set a timer and I hold myself accountable.

So you think I talked fast in this interview. Imagine what that 20-minute teaching is. We do replays for the people who register.

I always tell folks, if you really want to understand and you want to go deep, long before you're going to make that decision that you want to work with me, the 20-minute teachings are perfect for that.

They're once a month, they're 20 minutes, in and out. If we have questions, sometimes it will go longer than 20 minutes, but my teaching is done within 20 minutes.

And for that, they can just go to my website, which is StaceyBrownRandall.com/teaching. And whenever they hear this, whatever month we're in, that link will take them to sign up for whatever the next month teaching is.

Kelly Brubaker: I love that. That's awesome. Stacey, I can't tell you how much I am grateful for you being on the podcast and sharing knowledge. I mean, seriously, I just now created like a week's worth of work that I've got to figure out how to do better.

Stacey Brown Randall: Hey, listen, you don't have to go it alone, right? If you need my help, I'm here, so don't worry.

Kelly Brubaker: Right, right. Well, thank you so much for being on the show. I have thoroughly enjoyed this conversation.

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I feel like we could probably talk for like six more hours, but I know we both have things to do today. So thank you so much for being on the show.

And like I said, we'll include in the show notes links to what we talked about. And again, I encourage people, you know, reach out to Stacey, because this stuff is gold.

I hear so often, most of my clients are saying I can't compete with. You know, I'm in personal injury. I can't compete with Morgan & Morgan.

I'm in a town that's a big enough town, but half the attorneys do divorce, and so do I. I can't compete with all that. And I'm like, I feel like this is kind of the secret sauce.

Stacey Brown Randall: It is. One thousand percent. And I will tell you, that attorney I told you about, Amanda, she's personal injury. And let me tell you, where she lives, yeah, she's got her own versions of all that. Yes.

Kelly Brubaker: Right. Well, yeah, so I'm in Cleveland and we have Tim Misny. He's kind of the, he's been like the, the Lord of the personal injury.

I mean, we don't have very many billboards, but he has a couple of them and TV ads. I don't watch that much local TV, but I can remember coming home after school and he'd be on Tim Misny makes them pay.

And so most people in this area, they just go to him. Cause that's been like, he did the advertising. You can't compete with it at some point, but I love this because this is well within your control to do.

Stacey Brown Randall: It is. And here's the thing, there's plenty of, I always tell folks, it's the same thing I told Amanda with personal injury.

People who like, when they have a problem and like the people who are not going to go from a billboard or go from a jingle and they're going to ask somebody for like, who would you go to, right?

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That's usually the quality client you want, that usually has a case and it's usually more complicated. It's more complex and they there's a lot of folks who will call a billboard and there's a lot of folks who won't.

They will find somebody who has experience with an attorney and go through their recommendation and referral. And that's the piece people need to make sure that they have on lock.

Kelly Brubaker: No, I completely agree. OK, you are a wealth of knowledge, and I am very grateful to you. I think we're gonna have to do it again. We'll have to do a part two.

Stacey Brown Randall: Great, that sounds great.

Kelly Brubaker: But thank you so much. I appreciate your time today.

Stacey Brown Randall: Thank you.

Stacey Brown Randall: Thanks, Kelly, for being our guest host of the Roadmap to Referrals podcast.

All the ways to link with Kelly and learn more about her are below the video or, of course, on the show notes page at StaceyBrownRandall.com/427. Don't forget, Stacey is spelled with an E.

I really love having conversations with new people about referrals. New as in they've never heard referrals talked about or taught the way I teach them.

Particularly when it helps them realize they've been looking at referrals all wrong. Because I know it's like a breath of fresh air, right?

And this tsunami of relief when they realize that actually, you know, I can generate referrals in a way that feels good.

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The look that they always have, that look to me is priceless. I live for that look. When it clicks with someone and they're like, wait, referrals can be different?

Referrals can feel good and work and I can be a good human and take care of people in the process and get referrals? Yes, yes, just like Kelly learned.

So I appreciate Kelly being the guest host and interviewing me for this episode. Thanks again, Kelly.

Real quick, we are T minus 45 days away from the next and final Referral Accelerator for this year.

If you've been sitting on the fence and you are wondering if working with me is the next step for you, and maybe the Referral Accelerator, you've been wondering if it is the right fit, the first step you need to take is to complete our simple 10 question form.

It's there so that I can learn more about your business and make sure that we're a fit, that I can help you.

It doesn't mean you have any obligation to say yes, but it is the first step to start taking control of your referrals is to complete our 10-question form.

Ten simple questions that let me know what's going on with referrals, and then I can give you some great guidance.

And if you're fit to work with me, you'll learn that too, but that's a separate decision that you can make later.

But if that decision to work with me is something you've been noodling and you're thinking, I really wanna do this before the end of the year, I'd really like to go into 2027 with a referral engine built, ready to go, operating, it is functional, then you may need to be at the Referral Accelerator in Charlotte in October.

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And, of course, you can learn all about that at StaceyBrownRandall.com/accelerator. You can learn all the details.

There's a link to the 10-question form there or application. You can find all the information there, but we will be closing registration for the Accelerator very soon, so don't delay.

If you're hearing this and it's still August of 2026 and you're like, I need to know more, maybe I do want my referral engine fully built and operational in process, moving towards the finish line of the year, you want to end 2026 referral strong so that you can also start 2027 referral strong, then the Accelerator is the best next step.

You should probably check it out, StaceyBrownRandall.com/accelerator.

All right, remember to like this video, leave a five-star rating for the episode and subscribe to the show, whether you're doing this on YouTube or on your favorite podcast app. I also love feedback, so drop me a comment below. Bye for now.