

Ep #436: Referral Implementation Levels



Full Episode Transcript

With Your Host

Stacey Brown Randall

Stacey Brown Randall: Hey there. Do you love referrals but hate asking for them? Well, then you've come to the right place. This is the Roadmap to Referrals podcast and I'm your host, Stacey Brown Randall.

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I know today more than ever there seems to be this push where everyone seems to be looking for the easy button. I feel it. I bet you do too.

And I'm not even going to use the acronyms that feel like they're fueling that desire. And you know what they are. It starts with an A, ends with an I.

It seems to be fueling this desire for working faster but definitely smarter and definitely looking for that easy button.

I don't know of a single person and definitely a single business owner who doesn't try to find an easier way when it's possible. I think it's wired into us at some level.

But we also know there's never really a shortcut for the good stuff. When it comes to what you want to do to receive referrals, there isn't an easy button or a shortcut.

Let me say that again. When it comes to what you do to receive referrals, there isn't an easy button or a shortcut.

I'm also not saying it takes thousands of hours to be able to generate referrals. I'm just saying there isn't an easy button because referrals come from people, right?

And people take a little bit of cultivating and nurturing, and you got to do things a little bit different.

And so I think when you hear me say, hey, there's no shortcut, there's no easy button, at this point, I think there are two kinds of viewers or listeners to this.

The ones who say, well, if there isn't a hack or a shortcut or an easy button, I'm out.

And then the other group, like me, nods and has a grownup reaction and says, yep, I figured. Sounds about right in terms of how some things work in life.

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The rest of this episode is for those of you in the second group.

Our final referral fundamental is about implementation.

And understanding that the implementation of referrals, the strategies, the processes, the tactics, they happen on two levels. And they're both equally important.

Implementation happens at the firm or company level and implementation happens at the individual level.

When you think about the firm level, now, if you're a solopreneur and you are the company, then you're kind of both of these.

But when you think about this, I really want you to think through the things that can be processed, right? That can be put in place as a process.

And sometimes an automation. When we can lean into efficiency, we should.

So, there's things that operate at your company level, right? There's things that other members of the team can support you on.

There's things that you can put in place that happen automatically, right? In that automation or just part of that if then process of how things work.

So, things when it comes to referrals happens because that process, that checklist, that strategy runs, ultimately thinking about it, it runs at the firm level.

And then there's the secondary level, which is just as important, which is the individual level.

So, that's the second piece to how you have to understand how referrals happen, what the implementation looks like.

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So, yes, there's some things that other people can do that you can automate that you can really have executed on at a firm level.

And then there are the relationships, the people who refer, the people you want to refer. And that is going to take an individual approach, an individual touch.

Now, for my larger companies that are listening, you may have people on your team that are going to do that individual approach, right? That individual relationship.

For some of my smaller companies that are listening, you as a business owner may be that person who still maintains all of the relationships in the business and the referral relationships are no different.

There will always be a human element to generating referrals. It's not like most of your marketing strategies or even prospecting strategies. It's very different.

So, there is this firm level of where implementation works. And then there is this individual level where implementation happens. And they're both equally important.

Okay, I'm just going to pause here for a second because clearly my phone is not on silent. And now we're going to put it on silent. And I apologize for that interruption.

Let's get back to what we're talking about because my phone was going bananas there for a minute. My apologies. Okay.

There's no need for us to edit that out. Like, this is real life. Sometimes even when you've recorded 436 episodes of a podcast, you still forget to put the thing on silent.

Your phone. And I did. So, my apologies. Okay. Where was I?

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The firm level is one level of how we implement our referral strategies. And the second level, of course, is at the individual level.

And they're both equally important. And you need both.

When you think about the work that you do, right? The work that you're going to do to generate referrals, thinking about it at the firm level and the individual level, those are what we call fall into the three Ps.

So, it's the processes that you're going to put in place. Sometimes that means processes that kind of happen without you because they're automated to happen or something triggers them to happen.

Or there's someone else on the team that's making them happen. It's not falling on you to do it.

So, there's the processes that we run. Some processes may fall on the individual as well.

Then there's the plans that we build that are for the three groups of people who refer to us. The plans that we build to nurture referrals from those three groups.

And some of those mean, hey, when the plan says it's time to do something, you do something.

And other times the plan we built is actually how we're going to implement an entire process, like the client experience, within the business for all clients.

But there's the processes you run. And some of them operate at the firm level and others of them are operating at the individual level.

And then, of course, same thing when we think about the plans we're going to put in place. And the last P, it's just our fancy term for language. It's parlance.

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And that is, of course, the words we speak, the messaging we use, the language we use, the referral seeds that we plant. And this piece, of course, is critical.

So, the three Ps, processes, plans, and language, parlance.

And, of course, the two levels of execution or implementation, the firm level, and, of course, the individual level.

Because relationships are involved and you've got to form relationships to get referrals.

Now, interestingly enough, at the time that I am recording this, so this is weeks before this episode will actually come live, but at the time that I'm recording this, I'm actually hosting my fall Referral Accelerator.

It's actually my two-day workshop that I host in Charlotte where business owners fly in and they learn all of this stuff that we're talking about.

They learn about the ecosystem, all the processes, all the plans, all the language pieces, all the strategies. They learn it all in two days.

And while I'm teaching and the attendees are building, there is a really big focus on the language piece and getting that right as to what makes all of this work.

But you still have to understand the plans and the processes in addition to the language.

And you still have to understand the things you're putting into place or executed on at the firm level. And sometimes they need the individual human level touch as well. And they're both important.

But the truth is, and I tell this to my attendees, that most of the strategies and tactics don't really matter that I'm going to teach you if you don't nail the language, which I happen to call referral seeds or planting referral

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seeds, which is why understanding the implementation and the work involved is our sixth referral fundamental.

This whole series that we've been doing is about unpacking six of the referral fundamentals. That's not all of them, but it's the big ones I want you to know and understand.

If you want to generate referrals without asking, without incentivizing, without manipulating, you need to see referrals differently. And that is what the fundamentals are all about.

So what we're talking about here with referral fundamental number six is understanding that there are implementation or execution is going to happen in more than just like, hey, I've got to remember to do this one thing over and over again, that execution is going to happen at the firm level.

It's going to happen at the individual level. And the things that you're going to be executing on at those two levels are going to be plans, right?

The plans that you're going to put in place to generate referrals from certain groups of folks, the processes, the procedures, the checklist, the workflows, the automations you're going to put in place to make sure certain things are doing what we need to either capture the information or plant referral seeds.

And then of course, the language that we're going to use.

The whole point of these six referral fundamentals that I've been breaking down is to help you see referrals differently.

So you can understand the true depth and power that they could have for your business growth, but not just because, you know, you're wishing and hoping for them to happen, but because you're willing to do some work to be able to generate them.

So let me do a quick rapid-fire recap of all six referral fundamentals, but I do highly recommend you go back and listen to all the episodes in this

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series so that you can understand what each one is as I list them off in rapid fire format. Here we go.

Referral fundamental number one is how you define referrals.

Referral fundamental number two is where those referrals fit in your business development or sales strategy.

Referral fundamental number three is understanding the foundational philosophy of what we don't compromise with referrals.

Referral fundamental number four is understanding where referrals come from, what must exist, and the science behind them.

Referral fundamental number five, of course, is that referrals are so much more than one tactic. They live in an ecosystem. You've got to understand that to see all the places referrals can be hiding.

And of course, what we've just talked about, referral fundamental number six, that when you're doing referrals, we're implementing at two levels, and we've got the three Ps of the work that we do.

I hope you enjoyed that quick breakdown and I hope you enjoyed all of the episodes in this series.

I do a lot of work, not only with people who were first learning about me, so hey there if you're new in my world.

But I do a lot of helping people understand and a lot of teaching and getting folks to understand the way I teach referrals, the way we get referrals without having to ask or manipulate or turn our referrals into a marketing gimmick or network all the time like our life depends on it.

The reason why we don't have to do any of those things is because we deploy different tactics and strategies inside our business to generate referrals.

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And the one thing I really want people to understand is that that means you have to see referrals differently to take different action.

And even when I'm sitting in a room like I am right now with the October Referral Accelerator, sitting in the room with those business owners talking about teaching them all the things that they need to know and understand, I always start with making sure we're all on the same page about what you need to understand about referrals so that they can see referrals differently.

And this is for people who've been in my world for a while and then decided to work with me.

And I'm still making sure they see referrals correctly because as I start going through all the pieces and we start building out all the strategies and they start seeing how everything connects and how the system feeds itself and how this piece helps this piece make sense and this language makes this thing work, right?

As they're seeing how it's all interconnected, it always, always, always comes back to first can they see referrals differently?

Because if they can, well then, the implementation is the easy part. It's just about learning the pieces, building it out, and making it happen.

So hopefully you enjoyed all of these episodes, and you are now seeing referrals differently, just like my clients do.

All right, you can check out again all the episodes in the Referral Fundamentals series in the links below the video or of course on the show notes page, which is StaceyBrownRandall.com/436.

Remember, please like this video, give me a five-star rating and review, and subscribe to the show, whether you're listening on YouTube or on your favorite podcast listening app.

I also love feedback, so drop me a comment and let me know which of the six Referral Fundamentals spoke to you the loudest. Bye for now.

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