

Ep #242: What Can You Delegate with Referrals?

ROADMAP
to
REFERRALS



with *Stacey* **BROWN
RANDALL**

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Roadmap to Grow Your Business with Stacey Brown Randall

Ep #242: What Can You Delegate with Referrals?

Stacey Brown Randall

Stacey Brown Randall: When you're putting a referral strategy in place, how much of it do you have to do yourself, versus how much of it can be delegated? Well, we'll talk about what you can and should not delegate when it comes to referrals.

Hey there, and welcome to episode 242 of the Roadmap to Referrals Podcast, a show about helping you build a referral business. I'm your host, Stacey Brown Randall.

This is a question I get a lot and so instead of deciding to answer it in one of my every 10th episode, which is a question-and-answer episode, instead of just giving it a shortened version answer in a question-and-answer episode where I'm answering a couple of questions at once, I decided this topic of referrals and delegation needed its very own episode.

And actually, we're going to do two. What? Yes, it's going to be amazing. So, this is our first part.

The question is always what can be delegated when it comes to generating referrals? So, let's dig in and unpack this. I want to break down for you what can be delegated or outsourced, and then what you should not be delegating or outsource when it comes to generating referrals.

Okay, first easy answer. Can parts of the referral process be delegated? Oh, my goodness, yes, absolutely. I can hear all of your sighs and exhales of relief, all the way from where I'm sitting in North Carolina. I can hear you guys are like, "Yes," but I do need you to recognize that not everything can be delegated.

There are just some things you are going to have to do as the business owner or as the person who is the one that is what we call, the owner of the relationship with the referral source. So, I've got a couple of parts that I'll walk through that can be delegated or outsourced.

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Now, when you think about delegation, delegation is delegating it to somebody on your team. There's somebody on the team that you can give this to. Outsourcing is typically more considered, at least in my opinion, is somebody who may work with you but is more like their own business that you're then going to outsource this to.

So, when I outsource some of my social media to who I refer to as Kathy as my social media virtual assistant, she's not a part-time or a full-time employee within my business. She has her own company. I'm not the only client she has, but I outsource some of the assistance with my social media to her.

So, I'm going to use delegation as just whether you're delegating it to a part-time or a full-time W-2 employee that works with you and for you, or whether or not you were going to decide to maybe outsource this to somebody else that works with your company, but maybe is an independent contractor.

So, whether you're outsourcing or delegating it, I'm just going to use delegation to move forward. You just need to know that it applies however you need it to apply for your business. First part that can be delegated and in fairness, these are in actually no particular order. I just was capturing them as they came to me. So, these are the things that can be delegated.

Number one is the building of the different referral plans or strategies you want to execute on in your business. So, that means actually going through the trainings that I offer. Doing the exercises, building out this referral plan, which is for this group of referral sources and this referral plan, which is for a group of people who aren't yet referral sources.

The learning of what those plans, those strategies look like, the going through the trainings, the understanding it, that can definitely be delegated.

As the business owner, it is important that you recognize what they're doing and what the training looks like, and the point and the objective of it. But it

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doesn't mean you have to sit through and watch all the videos within every module, within the different trainings and strategies that I have.

So, you can definitely delegate to someone else to go through and learn how to build what the referral plans or strategies will look like for the company or for whoever is the person who's going to own the referral source relationships.

I do recommend though that if you don't know anything about how I teach, why I teach, and my philosophy and all the things, and you're like, I'm going to have my assistant learn it all, you probably need to spend a little bit of time just making sure you jive with me on my philosophy and what I'm about to teach to your assistant or marketing coordinator or operations manager or virtual assistant, or whatever it is.

So, I would say you should definitely know that you agree with the philosophy before you decide to completely outsource it. And understanding some of the information is important, but most of the time, the person who's going through the training can get you up to speed as they're showing you what they've been building.

The second thing that can be delegated with your generating referrals, is the actual execution of parts of the outreach to your existing referral sources. So, there are things you're going to do that you're going to do outreach to your existing referral sources.

If we're just thinking about the plan, the strategy to get more referrals from our existing referral sources, the execution of what those outreaches or what we call touchpoints would look like, some of that can absolutely be delegated to somebody else doing it, and that will definitely lighten your load. But it says parts of the outreach, not all of the outreach.

If you really do need to do some one-on-one time with your referral source, you can't have your virtual assistant do that for you. So, when we say that parts of it can be executed on by somebody else, absolutely, it's just

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typically not the conversational pieces that you're going to be doing when you're having a conversation with an existing referral source.

The third thing that you can delegate is actually the tracking of anything that's happening. Tracking of the outcomes, keeping up with the metrics, like the referrals that you're receiving. And who did that referral come to or who did that referral come from? Who sent that referral to you? Who is the referral source that sent that referral to you? What was all the information about that referred prospect.

Where is that referred prospect in the process of you closing them hopefully, into a paying client? Where are they in the pipeline? Where are they in the sales process? Definitely tracking outcome. Yes, they became a client. No, they did not.

Keeping up with all those metrics is really, really important. Just keeping up with the addresses of who your referral sources are, that can sometimes be a job in and of itself.

Particularly since COVID and people have moved and they're not in their offices anymore and they're now in a home office, and all that kind of stuff. All those kind of things in terms of keeping track of contact information, keeping track of the metrics or what's happening, the results — that all can be delegated to somebody else.

Now, you have to put a process in place of what it looks like because typically, the referral's going to come in. Let's use this as an example; you are the business owner listening to this. The referrals from me as your referral source, if I refer to you, I'm probably going to send it to you.

That doesn't mean you can't have it devised and looked a different way, but that's a strategy you've got to learn of like how to nurture your referral sources to not refer directly to you but refer to somebody else in your company. That's a process. You got to learn that strategy of how to do that correctly.

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But let's just say for sake of argument, I'm your referral source, I'm referring to you, but you have someone on your team, let's just say Sam, that's actually the tracking of all the metrics — of the referrals that come in, who is the referral source? Who is the referred prospect? Where are they in the process? Follow up in 30 days? Where are they in the process? Did it close? Did it not — all the outcome metrics.

You have to have a process in place. So, when I refer you how does it get to Sam who's going to be capturing all the information? So, keep in mind that's still like an if-then-type little process you have to have in place. It's got to be some type of process to that information can get to Sam so that it can be captured correctly. But you definitely can outsource or delegate the tracking of the outcomes, keeping up with the metrics.

And here's another thing that you can also ... which I think is really important that sometimes we overlook, but I think it's really important that you can also delegate is the keeping you organized. Somebody who knows what you are supposed to be doing and then making sure you don't forget to do it. They're keeping you organized.

The pieces of the plan that can't be delegated to somebody else to do, that you have to do yourself ... well, let's just say for sake of argument, you really need to spend some one-on-one time with your referral sources. Now, if you have 50 referral sources, maybe not all of them, maybe your top ones, but if you have 10 referral sources, maybe all of them.

And you need to spend over the next couple of months doing a little bit of one-on-one time with your referral sources of those that you can; whether that's on Zoom because they're not local, or maybe it is over coffee locally because they are local to you, whatever it looks like.

So, where you have to be the person who sits in the coffee meeting or the whatever you're doing, taking them play golf, I don't care. The whatever you're doing for that one-on-one time, the scheduling of it, the reminding you to schedule it, the taking care of scheduling it for you, the reminding

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you that it's coming up — all those things, the keeping you organized can certainly be delegated to somebody else to be in charge of.

You're going to hear (spoiler alert) coming up with next week's episode, I actually have a business owner and their assistant (who is in my group coaching program, BRB) talk about what this looks like, executing on what they learn and then making it happen, what that looks like for the business owner along with their assistant.

And so, I'm excited for you to meet them next week and listen to our conversation because they talk about what this has looked like over years and years and years of being a client of mine and actually, changing from one assistant to another assistant.

And so, it's been really cool to watch how seamless that transition has been for them. But it's going to be really cool for you guys also to hear them talk about what that looks like and the business owner addresses a little bit of the keeping organized and what pieces are managed.

So, when you think about generating referrals, if you have people you can delegate to or a person you can delegate to or outsource to, these are definitely four things that you can take off your plate and put on somebody else's to help you with your generating of referrals.

Now, of course, if you're a solopreneur, you are in the me, myself, and I club, that's okay. That just means you need some really strong processes, and you need to go step by step through the implementation of these things. So, you don't try to do everything at once and get overwhelmed. That's really, really important as well.

There are plenty of people that I have that are individual, solopreneur business owners that I have worked with over the years and in my program that they're doing it themselves, and that's how I do it. It's absolutely executable, it's not a problem.

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But if you do have someone you can delegate to, it is important that you understand what you can delegate. So, there's also things though that you can't delegate, and I want to address those too.

Pardon the interruption. Is it time you or you and your team put the processes and strategies in place to build a referable business? Yes, awesome.

I'd love to help you with that. Working with my clients, getting to know their business, their unique goals, and coming alongside them as the teacher, the trainer, and the cheerleader is my favorite thing to do. And I'd love to help you too.

Maybe it's time for you to take the next step by checking out the coaching program, Building a Referral Business. You hear me call it BRB.

Up first is for you to submit an application to make sure you're the right fit for BRB, and to learn more about it. Not everyone is a fit, so it's important you submit your application.

And if you're approved, then you can decide if joining right now is the best next move for your business. Go to staceybrownrandall.com/referable to learn about everything you receive inside BRB. Like access to weekly question-and-answer sessions with me, access to all 18 of my referral strategies that I teach, customized roadmaps to follow so you always know what to be working on and more.

Again, the link is staceybrownrandall.com/referable.

Okay, let's talk about what you shouldn't be delegating or outsourcing when it comes to your strategies to generate more referrals.

Number one, you cannot abdicate sharing the importance of building a referable business. Everyone on your team, everyone in the company needs to be on the same page as to why referrals are important. They need to know the why behind implementing strategies like this. So, the larger

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your team is, you may have somebody on the team going through and learning it.

But when it comes to implementation mode, when it comes time for them to say, “Hey, marketing, I’m going to need your help here or hey, operations, I’m going to need this communication created for me” — or whatever it is that they’re going to be pulling together and they’re going to need other members of the team to participate in or to be a part of, or “Hey, CFO, we’re going to need some dollars to go through the training,” whatever it is — you can’t abdicate that to the person that you have outsourced or delegated the learning to, the training to.

Understanding that it’s important and this is why we’re doing it, that comes from you, that starts at the top. So, you’ve got to understand why it’s important. You’ve got to understand why you want to be able to generate referrals in the way that I’m going to teach you to do it, and you have to buy into it.

And so, even if the top is you, or even if the top is you and an assistant, regardless if you have anybody else in the company, it starts with you saying, “This is how we want to grow our business and this is how we want to grow our business through referrals. And this is the strategies that we’re going to use, the philosophy that we are going to follow to generate referrals.”

And you have to be a hundred percent bought into that because that is what is going to be needed for the person you’re going to delegate to, to understand that, hey, this is important, and when I do need time and attention to execute on something, I will get it. And this is important to the company, this is important to the business owner. This is important from top down.

You can’t abdicate though selling this to everybody else in the company, to the employee. That’s actually going to be implementing these processes.

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They have to get that from you, and then that gets much easier for that employee or whoever you delegate to, to be able to say okay, I've learned it, here's what it looks like. And now, they have a more seamless transition to actually getting to implementation and execution mode.

Another thing that you can't delegate is when it comes to relationship building time, when you need to spend time with either the existing referral sources that you have the relationship with, or if there's new people you want to start referring new clients or contacts, centers of influence — those potential referral sources, there is a piece of relationship building that comes into how and why referrals work, and why they work so well. And it comes down to that relationship piece.

And so, you have to be able to take the time and to make it a priority and to feel like it's a priority to do the relationship building. You got to do that piece. You can't abdicate that piece. You can't outsource that piece. You can't delegate that piece.

Now, with that being said, that doesn't mean as your business grows or as you bring on other people into the company, that you can't hand off or transfer who owns the relationship with that existing referral source.

But of course, I'd love to teach you how to do that because that is a strategy that needs to be handled delicately and correctly. And there's actually a couple of different variables we look at in terms of the relationship you have with the referral source, of how to do that best based on a few variables and a few things that could or may happen.

So, I'm not saying you always forever and ever have to own or be in control of or being the one that's always managing the relationship with your referral sources. What I'm saying is until you go through the process to correctly transfer that relationship ownership to someone else in the company, to somebody else, you have to make that a priority. You have to be willing that hey, when it's time to do the relationship building piece, you've got to have to be willing to do it.

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And what that looks like for your company and for you particularly, is it's not the same for everybody. Some people have plans that are lower on the relationship building piece and some people have plans that are much higher. It depends on where you're starting, how many referral sources you have, what type of industry you're in. That's why we customize things inside BRB as you're going through the different trainings so that you get the right strategy for yourself.

And here's one more thing I want to mention that should not be delegated, though I know some of you are going to be like, nope, I'm still delegating it. And I know I see it happen and it breaks my heart, but I know it happens. But that doesn't mean it should. And that is, and some of you already know, you've already said it out loud, exactly what I'm about to say.

And if you're listening to this podcast in a crowded space, everyone just heard you say it out loud and they're wondering, what are you listening to? But it's the writing of the handwritten notes. They really need to come from you.

If you were being referred ... I know it's your company. When somebody refers a client, a potential client to me, yes, it's my company, but they're referring it to me. We refer to the people inside the companies. We don't refer to the brand, we're not referring to the logo, we're not referring to the company, we're referring to somebody inside the company that we trust will do the work for this potential client well.

So, you need to be the one who's willing to write the handwritten thank you notes when that referral comes in. Now, I know, and over the years of doing this, I mean, we are at 10 years, my friends, I have had people who are just like, "I'm not going to write those thank you notes and I'm going to have a third-party, online company do it for me and make it look like handwriting, which we all know it's not. Or I'm actually going to hire somebody to hand write all these notes for me."

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You know what? I've been doing this so long. I don't argue that point anymore. I'll be honest with the people that I work with. But I do frown upon it heavily, strongly, quite opinionatedly.

Because I really do think when someone takes the time to put their reputation on the line, no matter how busy you are, no matter what you're doing in life — I really do feel like when someone puts their reputation on the line and refers someone to you that the least you could do is take the two minutes it takes to sit down and write them a handwritten thank you note.

That's just a personal belief that you'll never change of mine. And it is one that I teach. I know not every single thing I teach my clients follow to the T, I have long since given up on that happening. But as long as they're having success, it's fine.

But here's the thing, I think when you think through the idea that somebody else can write your thank you notes to your referral sources, as that's not a valuable use of your time, I want you to reassess if it is. I want you to really reassess, do you have that right. Because I would say you don't.

Now, if you have a process in place for your handwriting notes, like hundreds of them, like every single year for every single thing that's happening, I understand maybe you outsource the writing of some notes that are happening in your business.

I'm just asking for you not to delegate the writing of your thank you notes to your referral sources. That's what I'm asking. That's what I would say you should not be delegating.

Now, here's one thing that people overlook: as the CEO or leader of your business, you don't have to be the one who personally maintains the relationships with your referral sources. Like a lot of times, you do need to be, depending on what your business looks like.

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But like I mentioned earlier, and I just want to reemphasize this point, for those of you listening — one of the things I teach inside BRB is how to transfer the ownership of the referral source relationship to somebody else in the business. But it needs to be somebody else in the business, not a contractor. Because you don't ever want that person ... I mean, I know any employee can leave a business, but we definitely want to make sure that person is staying in the business if you're going to transfer over that referral source relationship.

So, that is one thing that people overlook. As the CEO, even if you're the CEO of one person, yourself — well, in that case, you would not be transferring the ownership to anybody. But if you had more people on your team and you wanted to transfer the ownership or some of the ownerships of those relationships with referral sources, you certainly can.

But it is something that you do with a lot of thought and consideration. You do not do this just willy-nilly because you feel overwhelmed in a moment. Because if you don't handle it correctly, your referral source could stop referring you all together, which of course is the last thing we want for you.

So, there were a handful of things that you can delegate and a handful of things that you absolutely should not delegate. And what we talk about in today's episode can be found on the show notes page at staceybrownrandall.com/242.

Next week's episode is episode 243 and we'll talk about what delegation of the actual referral strategies looks like in action, in reality, how it's working inside a business that may be just like yours.

Until then, my friend, you know what to do; take control and grow your business. Bye for now.