

Ep #243: Referral Delegation in Action

ROADMAP *to* REFERRALS



with *Stacey* BROWN
RANDALL

Full Episode Transcript

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Roadmap to Grow Your Business with Stacey Brown Randall

Ep #243: Referral Delegation in Action

Stacey Brown Randall

Stacey Brown Randall: So, you know there are parts of the referral strategy and referral generation that you can delegate, but what is it really like? Well, let's go straight to the source.

Hey there, and welcome to episode 243 of the Roadmap to Referrals Podcast, a show about helping you build a referable business. I'm your host, Stacey Brown Randall.

So, last week's episode, episode 242 was on what you can and cannot delegate when it comes to generating referrals. I'm hoping it was a sigh of relief if you ever wondered if you could have someone help you with the building, the executing, and the tracking of all things referrals.

Well, today I want you to hear me discuss that awesome referral delegation reality with a client of mine.

Mark MacIntosh is the CEO of RevGrow. And Lori Reichner is his virtual assistant, his admin extraordinaire, who makes most, but not all of the referral strategy come to life. Two big things I want you to take away from listening to our interview.

Number one, how Mark talks about feeling as a CEO, knowing he has someone keeping their company's referral strategies operational, because as you'll hear him say, the strategies they've learned from me has given them their most successful ROI lead generation strategy they have.

And number two, how Mark and Lori both feel and managed the transition of getting Lori up to speed when she took over for a previous assistant.

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Yes, Lori's not the first person to actually implement and execute on the referral strategy for RevGrow. She came in after somebody else was doing it, and she'll talk about that handoff and what that was like.

What I really want you to know and feel as you're listening to this episode is that how it's possible to have someone help you with a delegation of your referral strategies, and then of course, how you're going to feel about it as you're doing it as well. So, here we go.

Mark and Lori, welcome to the podcast. Mark, I'm excited to have you back, Lori, I'm excited to have you on.

When I was creating the last episode for delegation, the topic of delegation, I thought to myself, who inside BRB, our coaching program, Building a Referable Business — who inside BRB or any of my past clients could best speak to delegation in action.

Like what it looks like to actually delegate the execution, and not only the execution, but also the building, the implementation, the execution of a referral strategy within a business, and of course, RevGrow came to mind.

I was like, “Oh, there's nobody else. These are the people we've got to chat with.” So, I'm excited that you guys are here today and that we get to have this conversation.

So, Mark, I want to start with you with our first question. So, I think every business owner is going to probably relate to however you answer this question, because I think it's a biggie for all business owners.

But knowing the execution of your referral strategy has help. You have help as a business owner making sure that the referral strategies, the pieces and parts that you guys have in

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place actually gets done. What does that feel like as a business owner having help with that?

Mark MacIntosh: That's amazing. It's peace of mind. It's getting into the rhythm and the routine and following your system. And it's just been great. I don't have to worry about it. I do my piece of it.

Anytime I get a referral that comes in, I copy Lori on that and she follows your system from start to finish, and just makes sure they get entered into the process and she asks me questions or gets clarification as needed, but she follows your system through and through. And it's been great, I just don't worry about it.

And it's so valuable that I know with my personality, and being busy with a lot of different things, I knew that I had to delegate it. Otherwise, I probably wouldn't keep up with it consistently. And it's such a high value program and we've gotten a tremendous ROI. But for us to implement it properly, I knew that we would have to delegate it.

Stacey Brown Randall: Yeah. I think you said the one thing that most business owners love to be able to say about different parts of their business, I just don't worry about it. I mean, like, how often do we actually get to say that as business owners to multiple parts of our business? I mean, so it's always great.

And to be honest, you really hit the nail on the head for me as to why when I have a company that I'm working with that has somebody on the team that can help them, I'm like, "Bring them in. They should be in the weekly sessions. They should go through the training themselves" because I know that that's one of the best ways to keep the implementation going year after year, after year.

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I mean, Mark, I think the very first time we worked together, it was like 2018, 2019, and here it is, 2023, and you're like, we're still doing it ,and we're still having success.

Mark MacIntosh: That's right.

Stacey Brown Randall: Right, you're doing the work and I think that matters so much and that's something that people really, really overlook. And it made me think as you were answering that question, I think the very first time that we started working together, you've actually never not had somebody on the team helping you.

Like it's always been ... I was thinking about it, I was like, "Wait a minute. Yeah, that's actually how you started with me." It was like you had Nicole and it was somebody, you're like, "If I'm investing in this, somebody's going to make sure we get the ROI out of it and it's not going to be named Mark and it's not going to be me."

Mark MacIntosh: That's right. Yeah. From the get-go, I knew I loved the program, loved the system, loved the training, loved everything about it.

But just knowing like I said earlier, my personality and what I'm focused on primarily day-to-day, I knew that I had to have somebody to help with the day-to-day and the monthly execution of it.

And so, yeah, with the training programs and the video trainings, and the steps you've laid out, we've actually had a couple different people in-house that have managed this for us.

And it was a very seamless transition with all your training available, all the resources, the learning curve to get Lori up to speed with it was pretty quick from what I could tell.

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So, thank you so much for doing that because I think the initial program, it evolved over the last couple of years and now, with the online training portals, it really makes it streamlined and has really helped us a great deal.

Stacey Brown Randall: Yeah, I think you're right. I think the ability for somebody to get up to speed quickly is the biggest difference between how quickly they can be successful.

So, Lori, let's talk about that for you. So, you came into working with RevGrow, you come in working with Mark, and you do a lot of stuff for him, you don't just execute on the referral strategy for him.

But at some point, he says, "Okay, and now you're going to run this referral strategy, and there's this language, there's this lingo that we use, there's like all these pieces." from the outside looking in, I know, because I've had people tell me it feels like it's going to be overwhelming.

And then when you get into it and you start actually like getting it and understanding it and having the pieces make sense, it all starts to make sense from that point moving forward.

But for you, when you came on board, and Nicole was handing this stuff to you, and you were going to take over and you were going to manage it, what was that like for you to feel like you could get a handle on it and you could feel like, "Oh, I'm now the expert about this strategy and these processes within the company."

Lori Reichner: Yes. Well, Nicole had me assist her in the very beginning, in like 2018, 2019 with just sending out the touchpoints. So, I had a little feel, but not much. And then when it was delegated to me and I trained myself, it was a lot of information.

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But everything you have Stacey's very organized, the training platform, all the videos I attend the weekly meetings with you and your team, the other BRB members there. So, it is very nice that you have a group of folks that you can discuss.

I have this idea what has worked well for you, what hasn't, the timing of things, and your guidance has made it ... I remember in the beginning I asked you a lot of questions. I'm like, "One more question, it's the way I learn."

So, watching the videos, writing down certain things, listening to others during those weekly meetings, hearing what they have to say, what works for them is all part of this entire process that really helps us to take it to the level that RevGrow needs to keep our referral partners happy and knowing us, and going through the program.

Stacey Brown Randall: And referring you.

Lori Reichner: And referring us, absolutely. And referring the most important thing. Yes. That's Mark's job. He gets all the referrals in and then I keep them all happy by keeping RevGrow top of mind for the referral partners.

Stacey Brown Randall: Yep. And I love how I'm listening to you answer that question, and you're literally speaking the language. You said top of mind and touchpoints and things like that because to your point, obviously, we've been doing this now for ... this'll be our 10th year, so this year is year number 10 for us.

So, I always tell folks we kind of know what we're doing. Like I got it figured out at this point. But I do know it is a new way of thinking and it's like sometimes when I talk to people who do sales training and they'll be like, "I want to learn your referral strategy too."

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I'm like, "Well, I need to get you to unthink about everything you think you know about referrals as it relates to sales because of how it's just been taught for forever, we just do it totally differently." And I feel pretty confident a hundred percent saying that's why it's successful.

And so, I think from that perspective, it is a lot to take on to learn. And I had forgotten, and I remembered when you said that Nicole had you assist, and then you're like here, then you got delegated everything.

And I remember thinking that was actually really, really smart at how Mark and Nicole kind of set that up so that you understood kind of what was happening, and then everything.

We've had other business owners with their, either like a marketing consultant or somebody on the sales team or an administrative support person or whomever, operations person — we've had other people go through the programs, learn the strategies with that person, with them, with that teammate doing it with them.

And I think there's a lot of value in the ability then to know that somebody else has the institutional knowledge too, and that way that the ball won't get dropped because there is multiple people or it's some person's job, it's in the job description, for them to manage that process.

But that makes me want to ask about the institutional knowledge piece because that's a big part for you guys as this went from Nicole to you Lori, and then there for a while. There was others kind of assisting as well.

But when you think about that institutional knowledge, the biggest fear, and Mark, let's start with you here. The biggest fear that business owners have is that I'm going to train

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somebody, I'm going to teach them all these things, and then eventually, they may leave, and that means all that institutional knowledge goes right out the door.

And you've talked about this in terms of how we've structured BRB to where all the training's actually online. So, there's a login that people can go in and watch what they need to watch to get up to speed.

How would you say that aided you guys in your ability to move quicker, getting Lori up to speed? Because it wasn't as if Nicole had to download all this information to her, you didn't have to do it, the trainings did it. So, what was that like for you as a business owner?

Mark MacIntosh: Well, it's amazing. Just that peace of mind, just having the training and the systems and the spreadsheets and the scripts, and the reoccurring calls and meetings, and just having that structure in place, and knowing that your community was there and you are there if and when we have questions and need anything, has really been amazing. And really just gives me a peace of mind that although it's a little bit institutional knowledge, it's very transferable.

And so, that's one of the things that we plan to be in it forever because I mean, Lori does a wonderful job and documents everything using your system, your processes, and keeps up with all of your changes and your improvements, and it's really, really been good for us.

Stacey Brown Randall: That's awesome. And I think that's important is to know, okay, if the institutional knowledge walked out the door, it's not gone. Like we have it, it's just a matter of getting somebody up to speed to be able to use it. And Lori's been doing this now for a number of years with us.

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Sometimes I always get a kick out of it. Well, people will ask questions during the BRB weekly sessions and they'll ask their questions or whatever. And then because Lori's been doing it so long, sometimes she's like, "Oh, this is how we do it."

And whereas, it's very valuable I know when people ask the question to get the response from me about how to consider to handle a situation or how to track something, hearing another business say "This is how we do it," is also very valuable for the group. And Lori is able to bring that in to BRB.

So, it's good to know, Mark, that you're going to let Lori be with us forever because it's always nice to have her give her thoughts too on like, "Hey, this is how Mark does it." Or "This is how we do it." Or "This is how I track that."

She's like my own little bit of institutional knowledge of how another company does it, so that's awesome.

Stacey Brown Randall: Is it time that you or you and your team put in the processes and strategies 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 or the trainer and the cheerleader is really my favorite thing to do. I'd love to help you too.

Maybe it's time for you to take the next step by checking out Building a Referable Business or BRB as we call it.

Up first, is for you to submit an application to make sure you're the right fit for BRB because not everyone is, and that's okay. If you are approved, then you can decide if joining now is the right move for your business.

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Go to staceybrownrandall.com/referable to learn about everything you receive inside BRB, like access to the weekly Q&A sessions with me one-on-one time with me, access to all 18 referral strategies that I teach, a customized roadmap to follow, and so much more. Again, the link is staceybrownrandall.com/referable.

Now, back to the episode. Okay Lori, so talk to us a little bit more about getting up to speed and like what that felt like for you with that transition and having access to the trainings. Like just talk a little bit about what that was like for you and like the Lori of what, four years ago versus the Lori of today.

Lori Reichner: Oh, well, I will say it is a big program and you have to work it, you have to work it. It's just not there. You have to do it, the work.

And we had the original spreadsheet for that year that I took over, 2019, whatever it was, 2020. And I looked back on an old one so I could see what was going on. So, we had a previous year that I looked at, and then with the current one, I went through the training with it.

So, every training module that I would go through, I would look and see what we have done. And then over time with using your workbook, I've added some things to that. We get ideas because we don't want to lose an idea on a certain touchpoint that somebody mentions whether in the meeting or in your training.

So, it's an idea to keep it somewhere that we might go back to or Mark loves books, so he'll send me all types of ideas. Here's an idea for a book, an eBook or regular book for that reading month of September.

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So, I want to capture those ideas, and that's what helps made it mine. And all of that is in that workbook, which is stored in a RevGrow, the company's site. So, it's not mine, it's up there. Anybody can have it, and I think that's very important, and documenting within that.

So, as your calendar, you have a calendar: what are our events, what are our touchpoints for that calendar? And then what did we do? How did they work? Did they work? If we sent out something, did we get a positive response from that, capturing that information?

So, two more years from now, we'll have new referral partners, we may want to use that same touchpoint and we have a history of that.

Stacey Brown Randall: Yeah, I love how well you keep notes. Like there are sometimes you and I will have conversations and I'm like, "Do you remember back in like January of 2019 you did blah, blah, blah" and I just remember it, which is, I'm not advocating necessarily for my memory, I just remember certain things about the touchpoints that a lot of my clients do.

And let me just pause for a minute and say, for those listening that are like, okay, they keep using the word "touchpoints." We use touchpoints as how we define the outreach we do to our existing referral sources. Of course, there are different strategies we deploy if someone's not a referral source yet and we want them to be and different things like that.

So, we went right into the lingo ourselves, just the three of us because we know the lingo, but I want to just pause for a minute and just say that for the listeners that don't know exactly what I'm talking about, kind of how that fits into.

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But this is part of the memorable and meaningful top of mind outreach that we do for existing referral sources, so we can plant referral seeds consistently throughout the year and be able to generate more referrals from our existing referral sources. So, let me just say that.

But Lori, it always cracks me up when I will say something and I'll be kind of close to maybe what it was and when you guys did it and you're like, "Nope, I got it written down. It's in the notes, it's right here. Here's what it is."

And let's be honest, when we got together and Mark, I'm so sorry you couldn't join us, but when we got together, the BRB group got together at the retreat last year and we did one day together as BRB members of referrals, and then one day together as the reverse goal setting — there was a document that I provided that was like the 50 plus touchpoint ideas.

And that had been something Lori had been like advocating for. I'm not going to say how long because then it makes me feel bad about myself. But she had been advocating for that for a while.

And sometimes, I want people to come up with things, but the truth is, watching Lori always be able to reference what they had done and other ideas they had come up with that they hadn't executed on, I was like, "Yeah, we probably need that list."

And so, it was awesome to provide that list. And Lori, I give you all kudos for that list being available to the BRB members at the retreat. So, thank you.

Lori Reichner: Very good.

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Stacey Brown Randall: Yeah. Is there anything you guys want to share about the delegation piece that maybe I didn't ask that you think is valuable for other business owners that are listening and making the decision that maybe they want to actually think through this, and what it looks like just from a delegation?

Is there anything I didn't ask that would be beneficial from that delegation perspective?

Mark MacIntosh: Well, I think having somebody like Lori with her attention to detail and her skillset, her organization skills, her note-taking skills, her being inquisitive, being assertive, I mean, all of those are attributes that make it all work.

So, she's very task-oriented. She keeps me on task, she brings creative ideas, she's proactive. And so, big kudos to you, Lori, because having someone without those attributes or traits or skillset. would probably make it a little bit more challenging.

Stacey Brown Randall: Definitely. There was actually somebody at the BRB retreat once they met Lori for the first time, they were like, "Oh my gosh, she's everything you want and the assistant doing this."

And I was like, "Yep, she is." And we laugh because we have a number of assistants or coordinators or whatever — number twos that are actually in the BRB like weekly sessions, asking the questions, not always the business owner.

And we always like, "Okay, you could always use a Lori in your life, you could always use a Christine in your life. You could always use a Joe in your life." We sometimes talk about those that are in the BRB group. They're not the business owner, they're the one executing on it. There's a number of them that it works that way.

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And so, it's always funny how we're like, "Oh, you got to have one of those in your life to make it work." Sometimes, not always. We have lots of business owners who are solopreneurs or small teams doing it themselves, and they're having success too, but life is easier when you got a Lori on your team. That is certainly, certainly true.

So, okay, so my final question for you guys would be, if someone's listening to this episode right now, and they've been thinking about joining BRB, our coaching program, Building a Referral Business, maybe they've submitted the application to join, maybe they haven't, maybe they're thinking about submitting the application and they're trying to decide if this is the right thing for them; what would you tell them in terms of making the decision to join BRB? Mark, why don't you go first?

Mark MacIntosh: Yeah, I'd say absolutely do it. We've tried several different initiatives over the last seven years. The vast majority of them do not work as well as we would've liked. So, this is one that far and away has produced the highest ROI for us, and it's been amazing. So, definitely recommend it.

There's a lot of marketing programs, initiatives, referral strategies where they sell you a bill of goods and for some people, it works, but for the vast majority it doesn't because they over promise, they under deliver. Stacey and her program is just the opposite, and far and away it's been the biggest ROI initiative for us since we began about four years ago. So, don't hesitate, just do it. It's well worth it.

Stacey Brown Randall: Awesome. Thank you so much, Mark. Lori, what about you? If there's somebody listening right now that they're like, "Hey, I need to get the business owner to do this as a member of the team or the business owner is thinking to themselves, what will this look like when I bring a team member on?" What would you tell them about joining BRB?

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Lori Reichner: I think it's very beneficial. I think there's so many different reasons why the program works. I mean, we've seen it.

Like Mark just talked about the ROIs, we see it in the numbers, it works. One of the greatest things is sending out one of those touchpoints and then seeing somebody post it on LinkedIn how grateful they were for it.

So, that's exciting and that's your referral partner. So, I think that's very beneficial. It is work and it's something that you have to devote time to. So, it's not just going to make its way to the front. Devote time to it, it will work.

And we have great training modules and again, that team where we meet once a week and we talk and learn about what others are doing and learn about your processes and new things that are coming out is extremely valuable.

Stacey Brown Randall: Awesome. Well, thank you guys so much for taking time to be on the podcast today. I really appreciate it and I love hearing what you share.

One, because let's be honest, it makes me feel amazing because I know it's working, and I know it's working for you. But also, I think it's really beneficial for others to kind of hear.

There's a lot of different ways that companies decide to learn these strategies and then deploy them, and you are one piece of that, of what it looks like to bring somebody in and actually deploy this from a member of the team to deploy this. So, thank you for sharing your knowledge. I so very much appreciate it.

I loved spending this time with Mark and Lori, and I was so grateful that they shared their thoughts on what it really looks like to put delegation of the referral strategies into action and what that looks like and how it feels for the business owner and

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the person who's actually executing on it, and what it really feels like and is inside a business.

Of course, you can learn more about RevGrow and I encourage you to check them out at the show notes page for this episode, which is staceybrownrandall.com/243.

It's super important as you're hearing this conversation, as you're reflecting back on this conversation that I had with Mark and Lori, that you also recognize Mark's been a client for four or five years.

So, what you hear them talk about, some of the things they talked about, the processes and systems they had in place, they didn't necessarily have those in place from the very, very beginning. This is something that evolved over time, but he had the right team in place to help him evolve it.

And if that's you and you're thinking about, "Hey, you know what, I've got a teammate who could help me do this," then definitely let's have a conversation because we let more than one person from our company participate inside BRB.

Alright, next week is episode 244. I cannot believe how close we're getting to episode 250. I can't wait to share next week's episode with you.

And until then, my friends, you know what to do: take control and grow your business. Bye for now.