

**Ep #259: When the Referral Situation Drives
the Tactics**

**ROADMAP
to
REFERRALS**



with *Stacey* **BROWN
RANDALL**

Full Episode Transcript

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

Ep #259: When the Referral Situation Drives the Tactics

With Your Host

Stacey Brown Randall

I believe the situation should always drive the tactic. Not everything is a nail for you to hammer, and a one-size-fits-all approach will not work with referrals. The referrals situation must drive the tactic you deploy. So, let's discuss two of them today.

Hey there, and welcome to episode 259 of the Roadmap to Referrals Podcast, a show about helping you build a referable business. I'm your host, Stacey Brown Randall.

We haven't had an eavesdrop from one of my BRB Q&A calls in a while. In fact, the last one was episode 241 and I think that was four months ago. So, I thought it was time that I share again some of the learnings that I'm providing to my BRB members during our conversations.

So, for those of you who are not a long time or a repeat listener of this show, BRB is my coaching program, and it stands for Building a Referable Business. And every week, I provide like office hours Q&A time to the members of that program. Now, this doesn't mean everybody comes every week because that would be crazy, but every week they know that I will be there answering their questions.

And last year something I started here on the podcast was me pulling little clips from those Q&A calls to share with you guys so you can get a taste of the things we discuss inside BRB and inside those weekly calls.

Now, the idea behind an eavesdrop, is that when you think about all the types of questions you could have with referrals, sometimes my members have questions because they are deep within a strategy and situations are presenting themselves.

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And that's why we love that weekly Q&A time because they can get fast on-demand answers for a situation that's happening in the moment. And that's really, really important for us to respond the right way in those referral situations.

So, some questions are a little bit more, as you would expect, a little bit more general. And then some questions are very specific to, "This is my situation I'm dealing with, with this referral source or this prospect that was referred to me, or this is my situation I'm dealing with, with this networking group, Stacey, how would you approach it?"

So, we get all kinds of questions in our Q&A sessions because they're really like a free for all. It's like what do you need to know? What do you need to ask? That's what we do.

So, I pulled two of these little clips, what we call eavesdrops because it's like you're listening in to a conversation that we've had inside BRB, but these eavesdrops for you to really get a sense of some of the stuff we talk about.

Now, to protect my BRB members, I'm going to give you an overview of the question they asked and then I'm going to play for you in this episode, my actual answer. So, you're not going to hear my BRB client, you're not going to hear the member ask the question, but you will just hear my answer to it.

So, here's our first eavesdrop; this BRB client has a client who has recently referred a potential new client to them. But what they learned is that when they were being referred to this new client, they were one of many that this referral source had provided to that potential client.

So, just to put this in context, let's use an unrelated example. Let's say you are a CPA, and you have a referral source who's having a conversation with someone and they're like, "Oh, I need a new CPA," and your referral source is like, "Oh great."

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Instead of just saying, “Here, call Megan, or here, call Sam,” the referral source says, “Oh, here's Megan's information and Sam's information and Tanya's information and Tony's information,” like gives multiple people.

And so, that was the first time this had happened to my client, and so that was the question that I answered with.

Now, in my answer, you're going to hear me ask my BRB member a question so I can get some more context and it's going to be about the pattern of how is this a pattern of how this one referral source refers to you? You're always one of many suggested or referred, or is this an isolated incident? As in they've never done this before but here, they did it this time, which is a new situation for you.

Now, again, you won't hear my BRB member answer, so you won't hear their response to that. So, let me go ahead and tell you what the response is.

Their response was at the start of my answer. So, the start of my answer is you'll hear me say it was an isolated incident.

So, what I want you to know as we listen in to this eavesdrop is that a BRB client of mine, has a referral source, recently referred a new client to them, but in referring them, referred a few other people as well, and my BRB client was like, “Hey, how do I handle this?”

And this is an isolated incident with this referral source, so you'll see how I use that to provide my answer because remember the referral situation drives the tactic you should deploy. And so, you'll hear me talk this through with my member. Here we go.

“So, do you think this person, this referral source, when they're referring you, this is a clue to you that they're probably referring others? Or do you think this is an isolated incident to this one client, maybe they referred others?”

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So, then more than likely, because it's an isolated incident, I don't think I would do anything, if you see a pattern develop with this referral source that they're referring you and others all the time. Let's see a pattern develop before we do anything.

More than likely, this potential client and your referral source had a conversation and something in that conversation with that potential client, they indicated something that made your referral source think, "Okay, I'm going to give you a couple people that I think could help you."

Because either they couldn't nail down what their problem was. So, she was like, "Well, if you have this problem versus this problem, that's two different people I would refer you to." Or this person's been burned before in the past and they want options.

So, just tread lightly with this client and be like, "Oh absolutely." You know what I mean? Like just love on them or whatever. I totally get it, like it is what it is. This one will be harder for you to land on, you're going to have to really connect with them. And somebody who's open to multiple referrals, like multiple solution options for one specific problem is not usually serious about their problem.

In terms of fixing it, because now they're about to enter into analysis paralysis because they're going to talk to multiple people and they're all going to say same things and different things and they may just decide it's easier just to not deal with the problem.

Now, that could be, but there is also a very real chance that this person wanted to talk to multiple people to figure out who they connected with both. So, go in it like this is your client to lose. They were referred to you, they're your client to lose, but I think I would just have lower expectation on the outcome.

Alright, now let's move on to eavesdrop number two.

Hey, pardon the interruption, when it's time to double, triple or quadruple your referrals, you need to join us inside the Building a Referral Business

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Coaching Program. How do you do that? Well, first you go to staceybrownrandall.com/referable to learn about everything that you receive inside BRB and some of the amazing success stories that we are having with our clients.

And the very first thing you need to do is submit your application. We keep BRB small because it's a smaller group that I intimately know lots of things about all of my members' businesses. You're not just one of hundreds and a crowd.

So, again, the link again so you can learn all about BRB and fill out your application to see if you're approved is staceybrownrandall.com/referable.

Here is eavesdrop number two. This question was asked by a BRB member about how to follow up with a prospect who isn't responding after they've been referred.

Now, I know we have all experienced this one, and this is some of the stuff like this is like my favorite part of BRB. You'll hear me reference a training that the BRB member knew what I was referencing. It may make zero sense to you if you're not in BRB.

But you'll hear me reference a training and I'll name it in my answer where my BRB member knows they can go to get more information and figure out that process of how they want to deploy that strategy and that training within this situation, because this is one I think we all deal with, nobody is immune to this.

Nobody is immune to the fact that sometimes, you have a prospect referred to you and they just don't respond after being referred, and there's a lot of reasons for that.

And so, we talk through not all of the potential reasons, but we talk through what do you do in that situation? And a lot of people are always like, "Hey, how do I follow up with the prospect?" And you'll hear in my answer, that's actually not where I want you to start. So, let's listen in to eavesdrop number two.

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So, I think because it's been like five days and then another five days, I think I would reach out to the referral source and it's more of a closing the loop with the referral source, not tattling on the prospect. But just more of a, "Hey, I just want you to know you connected me with so-and-so, thank you so much. I followed up after you connected us and then I followed up one more time about a week later just to make sure my email didn't go to spam, I haven't heard back from him, which is fine, people go at their own pace with this. But I wanted to make sure you knew that I had followed up."

And then just leave it more as a, I'm telling you what I've done, not necessarily trying to tattle on the fact that the prospect hasn't said anything. At that point, if she has information on the prospect, she may choose to share it.

"Oh yeah, he's like in the busiest week of his life, or he was just on vacation, or he was just whatever." She may not share any, and then she's like, "Okay, thanks for letting me know." And just be like, "Hey, if I don't hear back from him in another couple more weeks, I may follow back up with you. Just to let you know, I just want to keep you in the loop," and just use that language.

When it comes to the prospect, I would wait until after you've had this conversation with your referral source, like a real quick check in, closing the loop with your referral source, see what advice she gives you, and then if the advice is, "Oh, I'll nudge him," great, or then you can follow back up again.

But I think if you're going to follow up again, even if your referral source doesn't nudge them or give you any information on your behalf to help you out here, I would maybe let another 20 days, like two weeks go by, maybe three weeks, and just do a different follow-up.

So, not email, phone call, be like, "Hey, I just want to make sure you received my email, so-and-so connected us together. You may not be ready to have a conversation with me, that's great. Let me know if there's a better time to follow up with you."

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And then just leave it as they're busy. Don't assume they're not interested, assume that they're busy and you're just trying to make it convenient for them to connect with you.

Alright, I hope you enjoyed those two eavesdrops. It's always fun for me to go in and pick out little things to share with you of all the great stuff that we are doing behind the scenes inside BRB.

I would really love for you to consider joining us inside BRB if you want to build a referral business, and learn what that looks like and how to do that.

Now, if you're interested in catching any of our previous BRB eavesdrops, of course, you can go to episode 241 and you can listen in to the BRB eavesdrop on episode 241, and the other episode is 233. Of course, we will link to both of those in the show notes page. And the show notes page for this episode is staceybrownrandall.com/259.

Alright, coming up next week is episode 260, and since it's a 10th episode, we are answering questions that you guys, the listeners submit in our Q&A episode. Remember, anytime you have a question you want me to answer, all you got to do is shoot me an email or direct message me on social media.

I prefer LinkedIn and Instagram to any other platform. But shoot me an email or send me a direct message over social media. And of course, we'll get that question queued up in our Q&A episodes that we do every 10th episode.

Until then, you know what to do, my friend; take control of your referrals and build a referral business. Bye for now.