

Ep #297: Referral Experience vs Client Experience



Full Episode Transcript

With Your Host

Stacey Brown Randall

Stacey Brown Randall: There's one part of what I teach about referrals that is easily confused when it shouldn't be. So let's un-confuse you with this episode.

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

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Hey there, and welcome to episode 297 of the Roadmap to Referrals podcast, a show about helping you build a referable business. I'm your host, Stacey Brown Randall. My journey from a business failure to a successful business now 10 years in, I know, generating referrals naturally and consistently has made all the difference. Working with clients around the world, we leverage the science of referrals, protect relationships above all else, and help you build a referable business.

So for this episode, I want to break down an important distinction and how you think about referrals, specifically when it comes to the actions you are going to take to generate referrals. It's one that I find people confuse often.

So I was on a call with a business owner, and for this, we're just going to call her Amy. She was being super gracious with her time as she was sharing how she took what she read in my book and applied it inside her business. I love calls like this.

I'm also speaking at a conference to more business owners just like her, and she'll be there at that conference. So her thoughts were super valuable to me as well as I'm determining how I want to craft my keynote presentation for that conference.

So Amy, not her real name. Let me just say that again. We're calling her Amy. So Amy walked me through her different touch points that she had put into place from my book. It was so awesome to listen to her talk about it.

She started with her new client timeline, like what she says, what she does with a new client who has been referred to her. And there's at least like three to four different moments in that client experience of what she's doing specifically based on what she took from my book.

Now, when she finished walking me through, okay, here's what I do with my new clients that have been referred to me, I asked her a question.

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I asked her, "Other than the thank you note that you send to the referral source, because they obviously are the ones who referred that referred potential client, all the touch points you talked me through were directed to the new client who was referred. So what else are you doing to cultivate more referrals from that referral source?"

She paused and said, "Well, that's what I need to institute next." Let me tell you why I love this story so much. Two very important reasons. First, Amy read a book. happened to be mine, which, of course, I'd love that, but that's beside the point. And then she took what she read in that book, and she put a variation of it into practice inside her business.

She did the work. She sat with what she learned, and she figured out, as the business owner in charge of her own business, how to take what she had learned and put it into practice within her business.

Now, my book, *Generating Business Referrals Without Asking*, which is the book she read, is actually creating a touchpoint plan for your existing referral sources, the people who have referred you before, not clients.

But Amy had the forethought to take what she had learned mold it to work for her and put the process into place in the easiest and quickest way possible to start getting a return on her investment for reading the book.

And that was with her clients because it was already happening and she took what she read, she thought through how to like, modify it to make it work within her client experience.

There's also a second reason why I love this story. So one, of course, because Amy, she did something that I wish more people would do anytime they read a book, not just my book. But what are you learning from that book? And not only can you apply it how the author is talking about it, but are there other areas in your world that you can apply it as well?

We are allowed to take things that we learn and modify them to fit another area in our life, and in this case, in our business. And Amy did that by

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taking a book she read about how to get more referrals from existing referral sources and said, you know what, there's pieces here I can pull out and I can put it into place within my new client experience. And she's reaping the reward of that as well.

And then here's the second reason why I love this story. Because Amy also recognized her next gap to fill. the one that the book directly solves, she recognized that's her next gap to fill, that's next up for her to do, but she did these one at a time, so she wasn't overwhelmed trying to put multiple things in place at one time. It's like she got a two-for-one out of the book.

Now, Amy was very clear on the touch points that she put into place was for her clients. She knew after reading the book, I'm going to take what Stacey's talking about, I'm going to modify it to work, and I'm going to put it into place with my clients that are going through my client experience.

So she was very clear that what she was doing is for her clients and her client experience. And she is also very clear on knowing that that is different than what you need to be doing for your existing referral sources.

When I start talking about referrals and touch points and language and staying top of mind and all the things we do, most business owners that I work with, there is this natural inclination that somewhere in their mind, it's really subconscious I think, their mind instantly goes to what they are doing for their clients.

That makes sense, though, if you think about it. It's the people that we deal with on a day-in, day-out, week-in, week-out basis. So I start talking about referrals, and touch points, and language, and staying top of mind, and doing this, and doing that.

And naturally, you go to the group of humans that you're always talking to, which are your clients. But that's not what I want you thinking about when it comes to getting more referrals from your existing referral sources.

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So we've got to break down how we think about this. And this is one way where I see people get confused, this idea of this referral experience versus this client experience. And they are not one in the same.

Hey there, pardon the interruption. The roadmap to your referral explosion, it exists, and it's waiting on you, and you can start right now, before first quarter of this year is even over. Your first step is to apply for my coaching program, Building a Referable Business, or BRB for short. Go to StaceyBrownRandall.com/referable to learn more about the program and then click on the link to submit your application to see if you are a fit. If you'd rather work with me one-on-one, shoot me an email and I'll tell you more about my VIP Referrals in a Day. Now, back to the episode.

The way I want you thinking about client experience, referral experience, existing referral sources, potential referral sources, clients, we actually need to put them in buckets. It's like we need to put them in categories so we can think about the process that we want to apply to them.

Now, the reason why I wanted to do an episode on this is because every single time I'm talking with a client and I start talking about their existing referral sources, almost every time they will slip up and they will talk about how that would be applied to their existing clients.

And I always have to do a timeout. Wait a minute. You're thinking about your clients, and we're talking about your existing referral sources. And whereas your clients may be clients and also categorized as an existing referral source, we're talking about the things we're only doing for an existing referral source. And so I find myself doing a timeout a lot. And I wanted to do this episode specific to that because you may be finding yourself there.

You know, it's almost the end of February. It's a new year-ish. I mean, I still feel like it feels like a new year, even though all of a sudden, you know, before we know it, March is going to be here. We're going to be celebrating St. Patrick's Day if you're, you know, so anyways, but I still feel like if you're sitting there thinking about the ways that you want to uplevel your business

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and the ways you want to make things better, you have a couple avenues of where to go.

And business owners, we naturally think about the people that pay us, let's be honest, with our clients. And that's where I see my clients' brain going in terms of, hey, if I'm going to institute any kind of outreach or touchpoint plan or things I'm going to do within these moments that happen, it's going to be with my clients.

And so I wanted to give you a place where you guys could come back to being this episode for you to reset when you find yourself building out not something for your clients but something for your referral sources and you find yourself thinking about your clients. And maybe it's because you're thinking about those clients who are also referral sources.

So let me break this down for you. What you do for your clients, that is your client experience. It is made of the work that you do for your client, and it's made of with the things that you do that are building relationships.

Now, I know this kind of sounds confusing, but I refer to almost everything as a touch point, because that's ultimately what it is. But with our clients, our client experience, it is made of the work touch points, right? The work you deliver on. And it's made up of the relationship building touch points that you do where you're building that relationship with them.

You need both. But this is different from what you do for your referral sources. And what you do for your referral sources, even if they're a client, or a friend, or a center of influence, that is the referral experience. And so with the referral experience, we have to look at that differently than what we do for all of our clients.

The referral experience is only happening for those people who have referred you. So if they haven't referred you, they're not getting this referral experience, this touchpoint plan that we do just for our referral sources. So you really have to put these folks in categories and then think about the process you're going to put in place for each one of them.

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So the referral experience, which we call the touchpoint plan, is only for existing referral sources because they've referred you. So you are staying top of mind and being memorable and meaningful and using specific referral seed language because they have referred you.

And you are working to cultivate more referrals from them, which is different for what you are doing for all of your clients as they are moving through your client experience and moving through the different stages of your client experience, moving from a new stage to the active stage to the alumni stage.

Or maybe they move from the new stage to the active stage, and then they stay in the active stage ongoing because your goal is to keep your clients forever, like a CPA or a financial advisor. So it is different. What you do for your clients is the client experience. What you do for your referral sources is the referral experience. And we look at that from a touchpoint plan perspective.

You can't apply the referral source touchpoint plan, that referral experience touchpoint plan to your clients because they haven't referred you. And that's really, really important. And you can't also, you cannot apply this referral source touchpoint plan for your existing referral sources. You can't apply it to potential referral sources either because they haven't referred you yet.

Now hang with me, because this might start to get confusing. And for some of you may be thinking that sounds like a lot of work. It isn't.

Because once you have clarity on what plan you're building, who it is for, and then you only build it one at a time, just like Amy did in our example story, you can see how these three plans operate differently, no matter how similar they may seem to be.

So here are the three plans that I want you executing on in your business. And I want you to think about these, thinking through the idea that the client

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experience is different from the referral experience, okay? So let's break these down.

Let's go with existing referral sources first. So existing referral sources, they are getting a referral experience because they've referred you. We deliver that through the touchpoint plan, and this happens, specifically because we're looking to cultivate more referrals from them because they have referred you already.

So that's for our existing referral sources. We have a touchpoint plan that we do that's building that referral experience, that's cultivating to the place where they're actually going to start giving you more referrals.

OK, here's the second plan. This is what we do for clients. The client experience is delivered through how you work with your clients. It is repeatable. Every client receives the same client experience. And there are moments that you weave in opportunities for referrals and referral language or referral seeds throughout your client experience. But every client gets the same experience.

If you have different things that you offer within your business, so like I have a coaching program that offers one kind of experience, but everybody in the coaching program gets that client experience.

Versus if you're a VIP, and you're doing my done for you offer, which is Referrals in a Day, every VIP gets the same experience, but that VIP experience is very different from the coaching program experience. So you may have different client experiences based on what you're delivering, but it's what your clients get, and all your clients get it. It's repeatable.

Where the rub comes in sometimes is that you're going to have clients who are going through your client experience, right? They're in that repeatable client experience that you're doing, that mix of work touchpoints and relationship-building touchpoints, and they're also a referral source.

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Well, that's what we want. That's good, right? So the minute a client refers you, they are still a client getting that client experience, but now they get another experience layered on top, specifically directed at the fact that they have referred you and you want to cultivate more referrals from them. It's very important you guys get crystal clear on these different groups of people.

Okay, so the first one was existing referral sources. The second group was clients. Now let's talk about this third group for our third plan, and that's potential referral sources, the soon-to-be referral sources. These are people you've identified that you would love to refer you, but they haven't done it yet.

So they're potential. They're soon to be referral sources, but they are not current referral sources. They're not existing because they've never referred you, but you've identified them as someone you want to refer you.

So the cultivation and the follow-up you do as you're taking them through this process to cultivate them into a referral source so that they will give you that first referral and then hopefully keep giving you more, right? That's a different plan. That's a different strategy.

What I do for someone who has referred clients to me, I have so much more freedom in what I do and what I say, versus someone that I want to refer me that hasn't.

I'm spending a lot more time building up the know, like, and trust factor, and then also making sure that they understand that I'm here to help them, not necessarily be like just, you know, waiting around for them to actually get around to referring me. That's like completely the wrong way to think about it, right?

So the freedom that I have to build out what I want to do and make it very strategic and very much based on a calendar and it doesn't happen every day, week, or month for my existing referral sources looks very different for someone I'm trying to cultivate into a referral source.

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So that's why there's three plans. That's why when sometimes when I'm working with folks and I'm like referral experience versus client experience, and their minds are like, isn't that all the same thing? No, it's not. It's actually three different things.

And when you think about this, I always find the easiest way to do this is think about the who first. Who am I talking about? Then I can dictate which plan, right?

So if I'm talking about my clients, even if I want my clients to refer me, if I'm talking about my clients collectively, then I'm talking about the client experience, though there are absolutely ways to leverage moments within your client experience to leverage referrals.

So think about who am I talking about, then what plan, what strategy am I building out for? Is it for my existing referral sources, my potential referral sources, or my clients?

Referrals, they run through it all. It's like all in there. It all runs together. It's all throughout, right? It's all woven in there. But you have to build these plans separately because the audiences are different.

And that means your language is different, the what you do is different, and the outcome is different. And also the timetable you're operating on is different as well. So that's something I want you to keep in mind.

So here's some additional resources to help you, and I'm going to give you these resources. Of course, we're going to link them in the show notes page for episode 297. So the show notes page for this episode is StaceyBrownRandall.com/297. That's for episode 297.

But let me just kind of give you an overview of some resources to help you kind of get straight in your head, which plan am I working on? What group of people am I considering that I want to generate more referrals from? Then once I know who the people are, then I can back into building out the

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plan. And if you need some help building out those plans, here's a couple of things I want to recommend.

If you're thinking about your clients, for some of you, that may be the easiest place for you to start. If you're thinking about your clients, we did a series on the podcast a while back. It's from episode 151 through episode 165. It was like, I think that's almost like a 14-episode series. It was a summer series that we did, and it was specifically on the client experience.

Now, the client experience is so much more. than just, where are the moments where I can get referrals? Because it starts out with you actually being referable and then building into the moments where you can generate referrals.

So it's a longer series, but you know, maybe you've got some travel coming up. Maybe you're trying to run your next marathon. You got a lot of long runs out there, whatever it is. Maybe some of you in the South are getting ready to start cutting your grass pretty soon.

So it's episodes 151 to episode 165. That's a great series for you to go listen to that'll help you understand what the client experience looks like and what kind of plan you're building there for your clients.

For the second group of folks, our existing referral sources, an easy place to start is my book. And that may mean you need to go back and reread it, because maybe it's been a couple years. And you need to go back and reread it with fresh eyes, because you're in a different place. Things are going to land on you differently.

Of course, my book is *Generating Business Referrals Without Asking*, and it's available wherever books are sold. Maybe it's time for a reread of that book that'll give you that five steps you need to know about building out a plan to generate referrals from your existing referral sources.

And then that third group are potential referral sources, right? There's an article on my website that you can go check out. It's called, *What to Do*

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When You Need More Referral Sources. And the shortcut to that link is StaceyBrownRandall.com/referralsources.

But we'll put all of this in the show notes so you can get the link to my book for existing referral sources. You can get the link to the episode series that we did about the client experience so that you can have the understanding of what it looks like to build out a plan for your clients. And then, of course, we'll link to that article for potential referral sources as well. It'll all be linked on the show notes page for this episode, StaceyBrownRandall.com/297. That's for episode 297.

I still can't believe how close we're getting to episode 300. It's a little crazy. What's even crazier is I don't really know what I want to do for it yet. Better get on that. All right, guys, we are back with another great episode next week created with you and your needs in mind. Until then, you know what to do, my friend. Take control of your referrals and build a referable business. Bye for now.