

Additional Modules 2 – 6

FIVE SPECIALIZED LESSONS For a Full-Year Referral Initiative

Module 2 – Enhancing Your Referability

Total Training Time (videos and exercises) 90 Minutes

Lesson Curriculum

- 3 Critical Strategies to Become More Referable Sooner in Your Newer Relationships
- Clear Steps to Enhance Referability Over Time
- A Simple Model to Implement your “Client Service Promise”

Course Materials

- High Definition Training DVD + CD with Workbook
- 1 Audio CD (sound track of training DVD)



Module 3 – Referrals from CPAs and Other Alliances

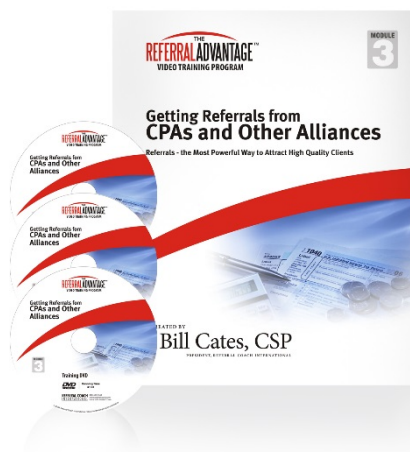
Total Training Time (videos and exercises) 2 Hours 20 Minutes

Lesson Curriculum

- Meet CPAs in the Easiest and Most Effective Manner
- Articulate Your Value Proposition to Become Referable and Distinguish Yourself from Other Financial Professionals
- Create Results with a 3-Phase Approach to Developing the Relationship and Starting the Flow of Referrals

Course Materials

- High Definition Training DVD + CD with Workbook
- 1 Audio CD (sound track of training DVD)



Module 4 – Leveraging Your Natural Market

Total Training Time (videos and exercises) 2 Hour 45 Minutes

Lesson Curriculum

- Articulate Your Value to Convey Confidence and Credibility
- Have Clear Goals for Approaching Your Natural Market
- Meet Your Natural Market to Generate New Clients, Referrals, and Presentation Opportunities (including 7 natural market best practices)

Course Materials

- High Definition Training DVD + CD with Workbook
- 1 Audio CD (sound track of training DVD)



Module 5 – Maximizing Business Networking

Total Training Time (videos and exercises) 1 Hour

Lesson Curriculum

- Maximize your Centers of Influence
- Get the Most from Formal Networking Groups Like BNI
- Use the 10 Commandments of Networking at Events

Course Materials

- High Definition Training DVD + CD with Workbook
- 1 Audio CD (sound track of training DVD)



Module 6 – Maximizing Social Event Marketing

Total Training Time (videos and exercises) 2 Hours 20 Minutes

Lesson Curriculum

- Meet CPAs in the Easiest and Most Effective Manner
- Articulate Your Value Proposition to Become Referable and Distinguish Yourself from Other Financial Professionals
- Create Results with a 3-Phase Approach to Developing the Relationship and Starting the Flow of Referrals

Course Materials

- High Definition Training DVD + CD with Workbook
- 1 Audio CD (sound track of training DVD)



Schedule a Call with Bill Cates to See if This is the Right Program for You

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