Virtual Learning Sessions | Topics & Pricing

Most virtual learning sessions run anywhere from 45 to 90 minutes.
The longer sessions allow for demonstration, role play, and breakouts.

Topics (Sessions will be tailored to the expected attendees.)
See following pages for more details

1. **First You Survive – Then You Thrive** **(New Agents/Advisors)**
   Get a Jumpstart on Client Acquisition through Referrals, Networking, and Communicating More Relevant & Compelling Value

2. **Multiply Your Best Clients in a Virtual World** **(For All Levels)**
   Meeting More Ideal (Perfect Fit) Clients through Referrals and Personal Introductions

3. **Becoming Radically Relevant in Unpredictable Times** **(For All Levels)**
   Communicate Your Relevant Value to Cut Through the Noise and Win More *Ideal* Clients

4. **Crafting Your Elevator Pitch** **(For All Levels)**
   Communicating What You Do & What Makes You Different to Spark Interest

5. **Your Riches Are in Niches** **(Established Reps)**
   Attract Ideal Clients in a Lucrative Target Market or Affinity Group

More Client-Acquisition Topics

Create a Customized Webinar That's Perfect for You

- Creating More Advocates for Your Business
- Creating Productive Referral Relationships with COIs Such as CPAs and Attorneys
- Building a Sales & Marketing Funnel that Keeps Feeding You Interested Prospects
- Maximizing Social Event Marketing to Meet High-Level Prospects
- Presentation Skills for Seminars and Other Marketing Events

Pricing Contact Bill for single + multi-webinar pricing. BillCates@ReferralCoach.com

Next Step Contact Bill Cates to discuss content and logistics and to schedule one or more sessions. BillCates@ReferralCoach.com

*More details on the content of these sessions is available. Just ask Bill for more info.

BILL CATES
RELATIONSHIP MARKETING SYSTEM

CERTIFIED e VIRTUAL PRESENTER

First You Survive – Then You Thrive

Get a Jumpstart on Client Acquisition through Referrals, Networking, and Communicating More Relevant & Compelling Value

A Coaching Webinar Session with Bill Cates, CSP, CPAE
High-Content ◆ Energetic ◆ Impactful

Acquiring new clients is all about your confidence. Prospecting to acquire new clients takes confidence in the value you bring quickly to your prospects and clients, as well as the confidence to leverage your great work into referrals and introductions.

How do you build that confidence? It starts with learning a proven process to communicate your value, help your clients recognize that value, and then put yourself in position to receive unsolicited referrals and as for introductions without pushing or begging.

In this high-content session you will discover how to:

- Develop a powerful mindset for growth.
- Become super referable in the eyes of your prospects, clients, and natural market.
- Promote referrals and introductions that can generate unsolicited referrals.
- Ask prospects, clients, and your natural market for introductions in an effective and appropriate manner.
- Secure a great introduction and position yourself to secure the appointment.
- Maximize your networking opportunities – both virtual and in person.
- Create productive relationships with Centers of Influence

Don't just survive! Thrive!

Bill Cates, CSP, CPAE, works with new and established financial professionals to speed up their growth without increasing their marketing budget. Advisors tap into Bill's proven process to multiply their best clients through introductions from advocates and Centers of Influence (such as CPAs and attorneys), communicate their value proposition more effectively, and create a reputation in a profitable target market. Bill helps advisors move from push prospecting to magnetic marketing – to attract more Right Fit Clients™.

Bill is the author of four best-selling books, ***Get More Referrals Now***, ***Don't Keep Me a Secret***, ***Beyond Referrals***, and ***Radical Relevance***. Bill is a highly sought-after international speaker and coach, as well as the founder of **The Cates Academy for Relationship Marketing™.**

Multiply Your Best Clients in a Virtual World

Meeting More Ideal Clients through Referrals and Personal Introductions

A Coaching Webinar Session with Bill Cates, CSP, CPAE
High-Content ◆ Energetic ◆ Impactful

Everyone's financial foundation has been shaken. They want to turn to someone they can trust.

This means, you want to start leveraging *the power of borrowed trust* that comes through introductions from clients and centers of influence.

In this just-in-time web class, Bill Cates will show you:

- Two powerful ways to suggest introductions that is totally sensitive to the current perfect storm with the virus, market, and overall economy.
- What other successful financial professionals are doing to grow their business during these trying times.
- How to enhance current client engagement to become super referable.
- 4 ways to promote and generate unsolicited introductions.
- A low-key way to ask for introductions without pushing, begging, or feeling inappropriate.
- 3 ways to create email introductions that connect you with the new prospect and spark their interest in hearing from you.

This web class will be a high-content, note-taking, ready-to-take-action program.

Bring your questions and challenges to share with Bill for some real-time coaching.

Bill Cates, CSP, CPAE, works with established financial advisors to speed up their growth without increasing their marketing budget. Advisors tap into Bill's proven process to multiply their best clients through introductions from advocates and Centers of Influence (such as CPAs and attorneys), communicate their value proposition more effectively, and create a reputation in a profitable target market. Bill helps advisors move from push prospecting to magnetic marketing – to attract more Right Fit Clients™.

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Becoming Radically Relevant in Unpredictable Times

Sharpen Your Message to Cut Through the Noise and Win More *Ideal* Clients

A Coaching Webinar Session with Bill Cates, CSP, CPAE
High-Content ◆ Energetic ◆ Impactful

In this just-in-time virtual session with Bill Cates, you will discover:

- Why now is a time to be **bold** about your value and how advisors are growing their business during this perfect storm (virus, economy, stock market).
- What other successful financial professionals are doing to grow their business during these trying times.
- How to message your value proposition to attract just the right clients and repel the rest.
- How communicate what makes you different in a way that matters to your prospects.
- One huge mistake you might be making when you talk about your value.
- A process to find the bullseye (Right-Fit Clients™) for your business.
- How to establish a reputation in one or more target markets to move from push prospecting to magnetic marketing.

What you do (or don't do) to grow your business today will show up 3 to 6 months from now. If you put off working on client acquisition, you may be digging a deep whole in your business.

This web class will be a high-content, note-taking, ready-to-take-action program.

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BILL CATES
RELATIONSHIP MARKETING SYSTEM

CERTIFIED VIRTUAL PRESENTER

Crafting Your Elevator Pitch

Communicating What You Do & What Makes You Different to Spark Interest

A Coaching Webinar Session with Bill Cates, CSP, CPAE
High-Content ◆ Energetic ◆ Impactful

How you communicate your value to prospects, clients, and centers of influence is fundamental to your success. Do you have clear, concise, and confident answers to the key questions that every prospect wants to know?

In this just-in-time virtual session with Bill Cates, you will discover:

- the 7 components to generating your Value Positioning Statement.
- the power of choosing the right target market for you.
- how to drill down even further to the bullseye – your Right-Fit Client™.
- The 5 key elements of your Value Positioning Statement.
- how to *identify* and *communicate* what makes you different – in a way that attracts prospects to you and helps you win more clients.
- a comfortable way to talk about your value in social settings such as gatherings of friends and family.

This is NOT an old-style, overly cute, Elevator Pitch. This is an authentic, professional, and interesting way to discuss your value with others.

This web class will be a high-content, note-taking, ready-to-take-action program.

Bring your questions and challenges to share with Bill for some real-time coaching.

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Your Riches Are in Niches

Attract Ideal Clients in a Lucrative Target Market

A Coaching Webinar Session with Bill Cates, CSP, CPAE
High-Content ◆ Energetic ◆ Impactful

Are you tired of pursuing prospects? Would you rather have qualified prospects pursuing you?

The evidence is clear. Financial professionals who focus on a target market generally grow faster and farther than those who don't.

Are there exceptions? Of course. But in today's market – full of mind-numbing noise, conflicting perspectives, pressure on fees, etc. – becoming the go-to expert in a clearly defined niche will reduce the business-development friction.

Targeting a Niche Market or Affinity Group Will Help You:

- Communicate a more relevant and compelling marketing message.
- Become super referable faster – to get referrals without asking.
- Build a reputation that attracts more Right-Fit Clients™ – profitable and a joy to serve.

In This High-Content Session You Will Discover How to:

- Choose the right target market.
- Bust the 5 common misconceptions that keep you from getting rich in your niche.
- Identify the right prospects inside your market.
- Maximize the power of a well-defined market focus.
- Get more introductions to high-quality prospects.
- Expand the geographic reach of your business (if you wish).
- Create a reputation that draws prospects to contact you.

It's time for you to narrow your focus to expand your results.

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