

1:1 Coaching Programs

with **Bill Cates**, CSP, CPAE

Turbo-Charge Your Client Acquisition Process!

3 highly-customizable 1:1 coaching programs designed to significantly increase your revenue without increasing your marketing budget.

"Helping the Best Get Better!"



BILL CATES
RELATIONSHIP MARKETING SYSTEM

www.CoachCates.com

BillCates@referralcoach.com | 301.497.2200

“As a result of Bill’s coaching, I have brought in **\$12.7 million in new assets. That’s **\$170,000 of recurring annual income** due to using Bill’s techniques.”**

Erin Gay, CEO & Founder
Legacy Financial (Annapolis, MD)



Schedule a brief strategy call with Bill to determine which program is right for you!

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About Bill Cates

"The Original Referral Coach"

Focus Your Messaging | Maximize Engagement Leverage Your Relationships



Think about it...

Professional athletes use coaches all the time to make critical adjustments - to reach and sustain a high level of performance. So, why don't you? You are a professional, too!

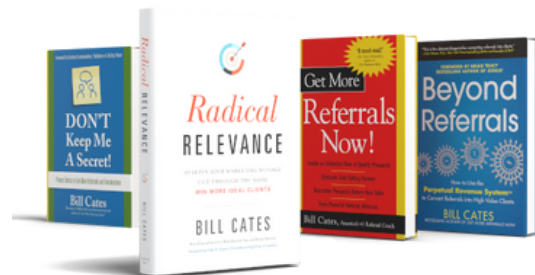
Bill Cates offers **three (3) 1:1 coaching programs** that provide intensive, personalized help in key areas proven to transform your business. The programs build on each other, so you will always have the option to upgrade to the next level and be credited your initial investment.

Call **301.497.2200** or email **BillCates@referralcoach.com** to ***schedule a complimentary strategy call with Bill to determine the best program for you.***

Bestselling Author, Successful Business Owner and Relationship Marketing Expert

For over 25 years, Bill Cates has been helping professionals and companies grow their businesses exponentially by leveraging the power of referrals, introductions, and communicating compelling value. Bill has also been featured in many publications and programs, including *The Wall Street Journal*, *ABC Business Report*, and more.

Bill is the author of the bestselling books *Don't Keep Me a Secret*, *Get More Referrals Now*, *Beyond Referrals*, and his popular new release – *Radical Relevance*.



To learn more about Bill's books, visit: **www.amazon.com/author/billcates**

Program #1 | \$799

Create Your Compelling Value Proposition: *Cut Through the Noise & Win More Right-Fit Clients*

The most fundamental factor determining your success is your belief in - and how you communicate - your value.

Have you ever had a prospect – who seemed to be interested in your services – suddenly go radio silent? Have you ever received a solid introduction to a great prospect – someone your referral source said could truly use your help – only to have that “great prospect” give you the cold shoulder? Ouch!

Bottom line? You can either be relevant, or be ignored. Be compelling or be forgotten.

OUTCOMES & BENEFITS:

Bill Cates will walk you through the 3 Critical Value Decisions, and then help you express those foundational concepts on both strategic and tactical levels, including:

1. Your Main Target Market

If you already have one or more target markets, we'll fine tune your approach to improve your results. If you don't yet have a great target market, you'll learn how to pick the right target market for you and begin building your client-attraction plan.

2. Your Bullseye (Right-Fit Client™)

Clear intentions produce clear results. Vague intentions produce vague results. This program will help you become clearer and more precise with you want to attract into your business and the language you need to use to do so. Right-Fit Clients are a joy to work with, are more profitable, and make the right kind of introductions.

3. Your Differentiation

Are you using your differentiation to stand out, attract great clients, and separate yourself from your competition? This program will give you a simple way to express what makes you different from others in a way that truly matters to your prospects.

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Your Program Includes:

- 45-minute Video Lesson
- Guide: *Your Compelling Value Proposition Generator*
- Guide: *How to Become Radically Relevant on LinkedIn*
- Audio: Case studies of advisors who have found riches in niches
- Up to 2.5 hours of customized 1:1 coaching with Bill Cates (typically spread over 4-5 calls)

How Your Program Works:

- Complete your Radical Relevance Assessment and begin work on Your Compelling Value Proposition Generator
- Schedule and hold your first 1:1 coaching call with Bill
- Based on the outcome of your first call, Bill will provide additional tools and reinforcement resources (case studies, videos, scripts, checklists. etc.) to add clarity and confidence to your progress
- Spend some time practicing and implementing the concepts you learned into your business, taking note of areas that would benefit from additional clarification and coaching.
- Schedule and hold your remaining 1:1 coaching calls with Bill

"Vague intentions produce vague results. Clear intentions produce clear results."

ONLY \$799

A small investment to bring clarity, confidence, and results.

**Schedule Your Complimentary Strategy Session
with Bill to Determine the Best Program for You**

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“

Before I met Bill Cates, I was making a ton of cold calls. Bill showed me how to go from cold calling to referrals and I tripled my production the very next month. I would not be where I am today without learning Bill's processes.

”

James Mwombela,
Insurance Advisor (Washington, DC)



Program #2 | \$2,499

Multiply Your Best Clients: *Start Building a Thriving Referral-Based Business*

Once you've built your foundation of a compelling value proposition, it's time to leverage it to get more Right-Fit Clients through referrals and personal introductions.

In addition to everything in Program #1 (see above), you will receive a 1-year membership to The Cates Academy for Relationship Marketing™ – our comprehensive online video learning platform – with at least 2 additional hours of supplemental 1:1 coaching support along the way. If you're ready to **take your business to the next level by multiplying your best clients**, Program #2 may be the right fit for you.

OUTCOMES & BENEFITS:

After completing this program, you will understand the core concepts that will enable you to:

- Communicate your value to attract only the right clients into your business.
- Enhance client engagement to get unsolicited referrals and introductions.
- Ask for introductions without pushing or begging.
- Secure solid introductions and appointments that stick.
- Create powerful and effective centers of influence.

Your Program Includes:

Everything in Program #1 listed above, *plus...*

- **1-Year's Membership in The Cates Academy for Relationship Marketing™** (*Learn more at www.TheCatesAcademy.com*)
 - **Course 1** – Communicate Your Compelling Value to Win More Clients
 - **Course 2** – Get Referrals without Asking by Enhancing Client Engagement
 - **Course 3** – Requesting Referrals without Pushing or Begging
 - **Course 4** – Secure Solid Introductions and Appointments that Stick
 - **Course 5** – Create Powerful Referral Partners and other Alliances
- **At least two (2) additional hours of customized 1:1 coaching** with Bill Cates* (**at least 4.5 hours**)

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How Your Program Works:

- **Complete all steps in Program #1** (see “How Your Program Works” section in Program #1 above), **including your 1st two coaching calls**. Upon completion, you will have established your Compelling Value Proposition.
- Schedule and complete your Cates Academy™ kick-off call with Bill Cates. During this call, you and Bill will identify the specific areas where you would like to focus, and schedule your follow-up coaching calls accordingly. You will also receive **unlimited email coaching** between calls, and for the life of your Cates Academy membership.
- **Begin working your way through The Cates Academy™.**
- Hold **coaching call #3 with Bill** to address challenges and brainstorm situations. Bill will provide any further guides, case studies, videos, scripts, or checklists to add clarity and confidence to your progress.
- Continue progressing through The Academy and applying concepts learned to your business.
- Hold **remaining coaching calls with Bill**, establishing a game plan for ongoing results and success.

“Go from incremental growth to exponential growth without increasing your marketing budget.”

ONLY \$2,499

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“ *I wanted to create a ‘referral culture’ throughout our firm where everyone felt comfortable asking for, and generating, referrals. In our first 3 months of working with Bill Cates, we have generated more referrals than in the last 3 years!* ”

Charlie Epstein,
Epstein Financial Group (Springfield, MA)



Program #3 | \$6,499

Complete Marketing Transformation: *Accelerate Exponential Growth by Mastering Your Client Attraction Process*

Do you dream of reaching the level of success that allows you to work "*by referral only*," maintaining a perpetual flow of Right-Fit Clients?

While prospecting will always be a part of how you bring new clients into your business, the right marketing can deliver quality prospects to your doorstep, so that you can spend less time *chasing after* business, and more time *enjoying* the business (and life) you've built.

This program includes everything in Programs #1 and #2, plus takes a comprehensive deep-dive into the implementation of your client acquisition process with at least 10 hours of direct 1:1 coaching support with Bill Cates, plus hours of Bill's time spent providing feedback and developing concepts for your review.

OUTCOMES & BENEFITS:

Program #3 is for those of you that are truly ready to commit to – and invest in – a complete marketing transformation to accelerate your success. While the strategies and tactics covered in this program are consistent with those covered in Program #2, the difference lies in the amount of comprehensive 1:1 coaching support that you will receive from Bill Cates (at least 10 hours total) to help implement these concepts into your business. In addition to those scheduled calls, you will receive unlimited access to email coaching and “quick hit” phone coaching from Bill to address specific questions and issues as they arise.

Key Areas of Focus:

- A process to discover your complete value proposition
- Applying the neuroscience of relevance to your messaging
- Choosing or refining your target market
- Developing your Right-Fit Client profile
- Developing one or more Value Positioning Statements
- Communicating what makes you distinct and how that benefits your clients
- Building your LinkedIn profile to properly reflect your compelling value
- Developing a framework and text for your website
- Becoming Super Referable through more engaged clients
- A process to ask for referrals/introductions without feeling pushy or needy
- Turning willingness to refer into sold introductions
- Creating productive relationships with key Centers of Influence
- Maximizing the client-acquisition power of Social Event Marketing

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Your Program Includes:

Everything in Programs #1 and #2 listed above, plus...

- **5.5 additional hours of customized 1:1 coaching** with Bill Cates (at least 10 hrs. total)
- eGuide: Building a Radically Relevant Website
- Audio: Various Case Studies from Successful Advisors

How Your Program Works:

- Due to the highly-customized nature of this program and the amount of 1:1 coaching time included, the first step is to schedule a kick-off call with Bill to discuss goals and challenges, and establish a **personalized game plan** based on your unique needs.
- Based on that discussion, a timeline and schedule will be created for working through **everything included in Programs #1 and #2** (see above), with **up to 10 hours of 1:1 coaching** calls scheduled at predetermined intervals along the way for maximum reinforcement and implementation support. Please note that the price of these packages is not directly related to the number of coaching hours, as each level up requires significantly more prep work on my end prior to each call due to the amount of personalization and customization.
- You will also get **unlimited access to email coaching and “quick hit” phone coaching** from Bill – to address specific questions, debrief a meeting, or plan for an impending appointment.

“The same thinking and actions that got you to where you are will not get you to where you want to go.”

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“ ***I revised my business development roadmap based on Bill's tools and guidance. Let me just say, we're off to a roaring start in 2020! Our pipeline is stronger & deeper than it's ever been, and the way I interact with COI's and prospects is 180° from where I started.*** ”

Ryan Weissmueller,
CPA, President - Fintrepid Solutions (Scottsdale, AZ)

