



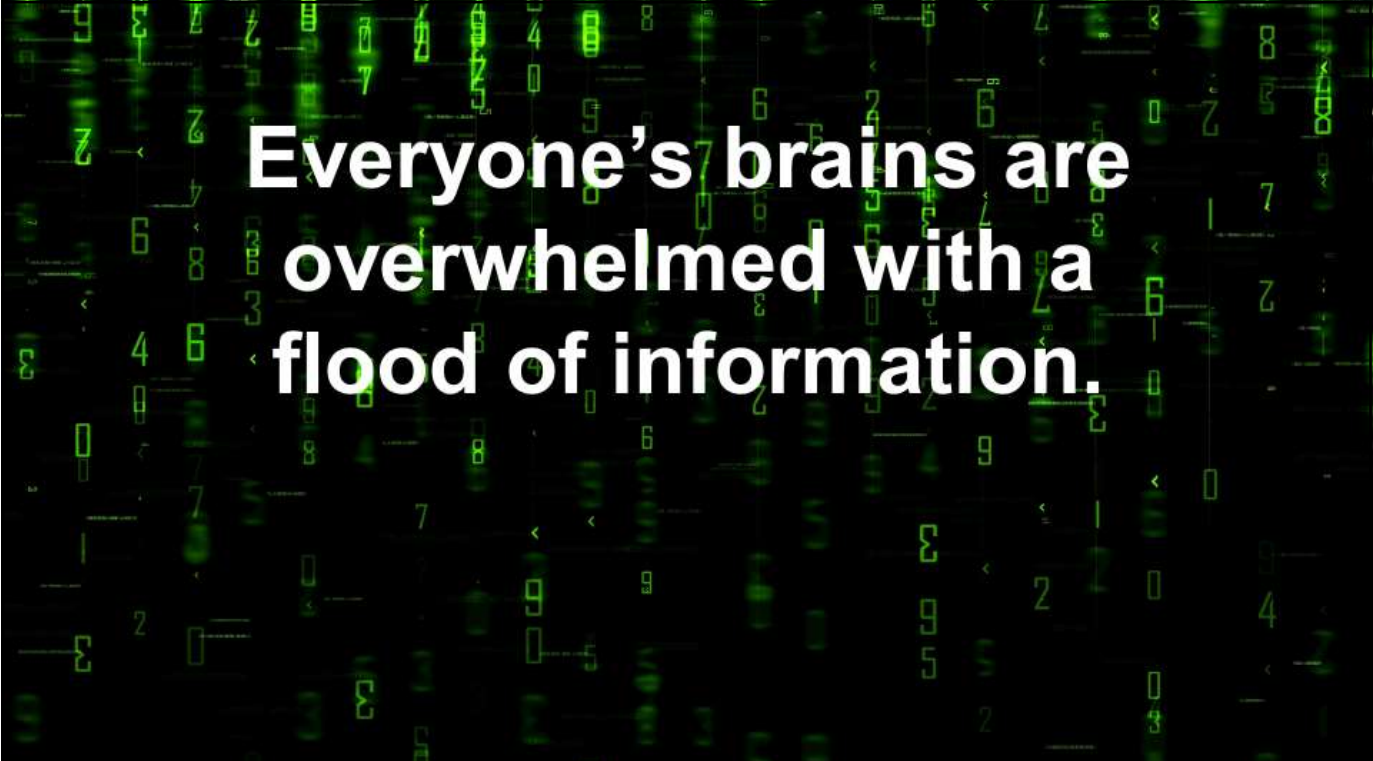
Becoming Radically **RELEVANT**

Bill Cates, CSP, CPAE
Referral Coach International

- 🎯 Sharpen Your Marketing Message
- 🎯 Cut Through the Noise
- 🎯 Win More Ideal Clients



1



Everyone's brains are overwhelmed with a flood of information.

2



How do you
get your
messages
through?

3



You have to hit the
bullseye in their brain
with a **message** that is...

relevant to grab their
attention and

compelling to drive them
to action.



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RELATIONSHIP MARKETING SYSTEM

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CHAPTER 1

THE 17 RULES OF RADICAL RELEVANCE

RULE #1

The straightest line to relevance with a prospect is an introduction from someone they trust.



5

Borrowed trust will get your foot in the door.



How you and your clients talk about your value will take you the rest of the way.

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6

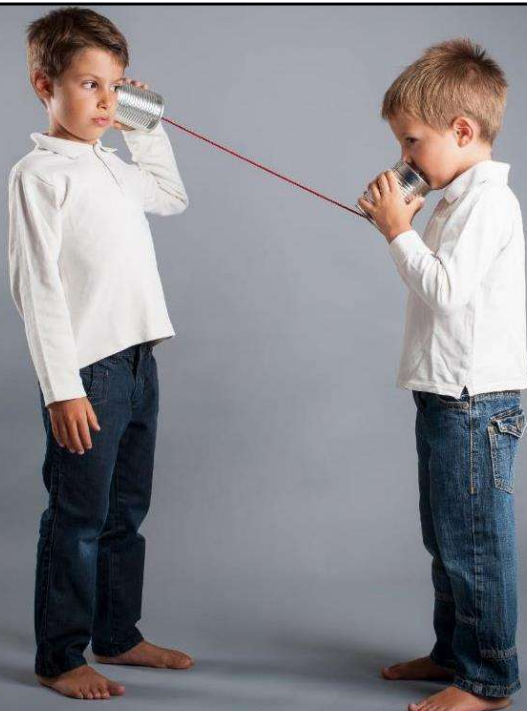


Brent Fewox
Anthem Financial Services

We recently got a referral to a client who brought in \$7M in assets.

She said, “My advisor never treated us the way that you do. I think I heard from him a couple of times per year.”

7



Where do you **Communicate** your Value Proposition?

- Website / Social Media / Printed
- Biz Networking / Community Events
- Social Gatherings / Client Events
- Contacting Prospective Clients
- Ongoing with Our Current Clients
- In Person / Voice Mail / Email

Everywhere!

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What are you trying to accomplish when you communicate your value?


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Paul Coles
Alliance Wealth Advisors

We have an ensemble practice of 7 advisors. We want everyone on the same page – a common language that clients can reference.

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Communicate Your Value Proposition?

To ~~Impress~~ People

HINT: You are not the hero.

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Radical RELEVANCE
BILL CATES

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Your Prospects and Clients

The Villain

You & Your Team

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What Villains Do You Fight With Your Hero Clients?

A close-up of Darth Vader's helmet, looking forward, set against a dark, industrial background with blurred lights.


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Three books titled 'Radical Relevance' by Bill Cates are shown in the bottom right corner.

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A circular portrait of Jason Jenkins, a man with short brown hair, wearing a dark suit, white shirt, and dark tie, smiling.

Jason Jenkins
Simplicity Group

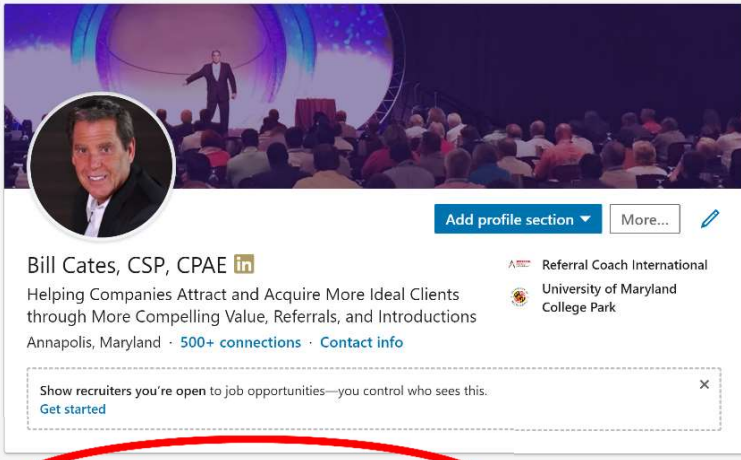
Your clients' stories
are your biggest asset.


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RULE #13

Use more personal messaging. Go from I, *we* and *our* to *you* and *your*.

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Bill Cates, CSP, CPAE 

Helping Companies Attract and Acquire More Ideal Clients through More Compelling Value, Referrals, and Introductions


Annapolis, Maryland · 500+ connections · [Contact info](#)

[Add profile section](#) [More...](#)



[Show recruiters you're open to job opportunities—you control who sees this.](#)
[Get started](#)

Enough About Me - Let's Talk About YOU

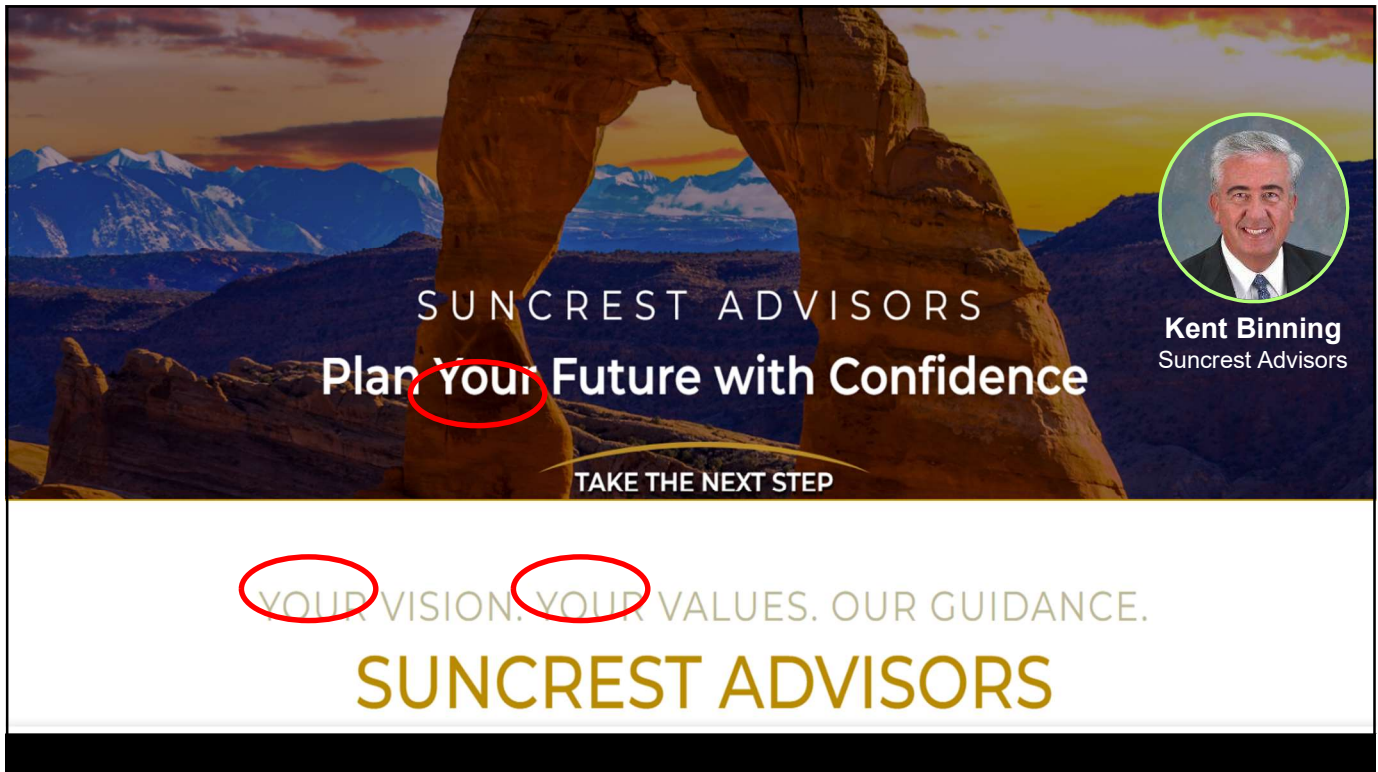
If you're an individual professional, you're probably looking for more Right-Fit Clients - clients who are a pleasure to work with and who appreciate you for all the right reasons. Are you finding it challenging to reach these people? Are you maximizing the referral/introductions process? Are you communicating just the right message to get them interested?

John M. Gentry · 2nd 
Dynamic & Passionate Executive - Who Understands How To Build Distribution

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SUNCREST ADVISORS

Plan Your Future with Confidence

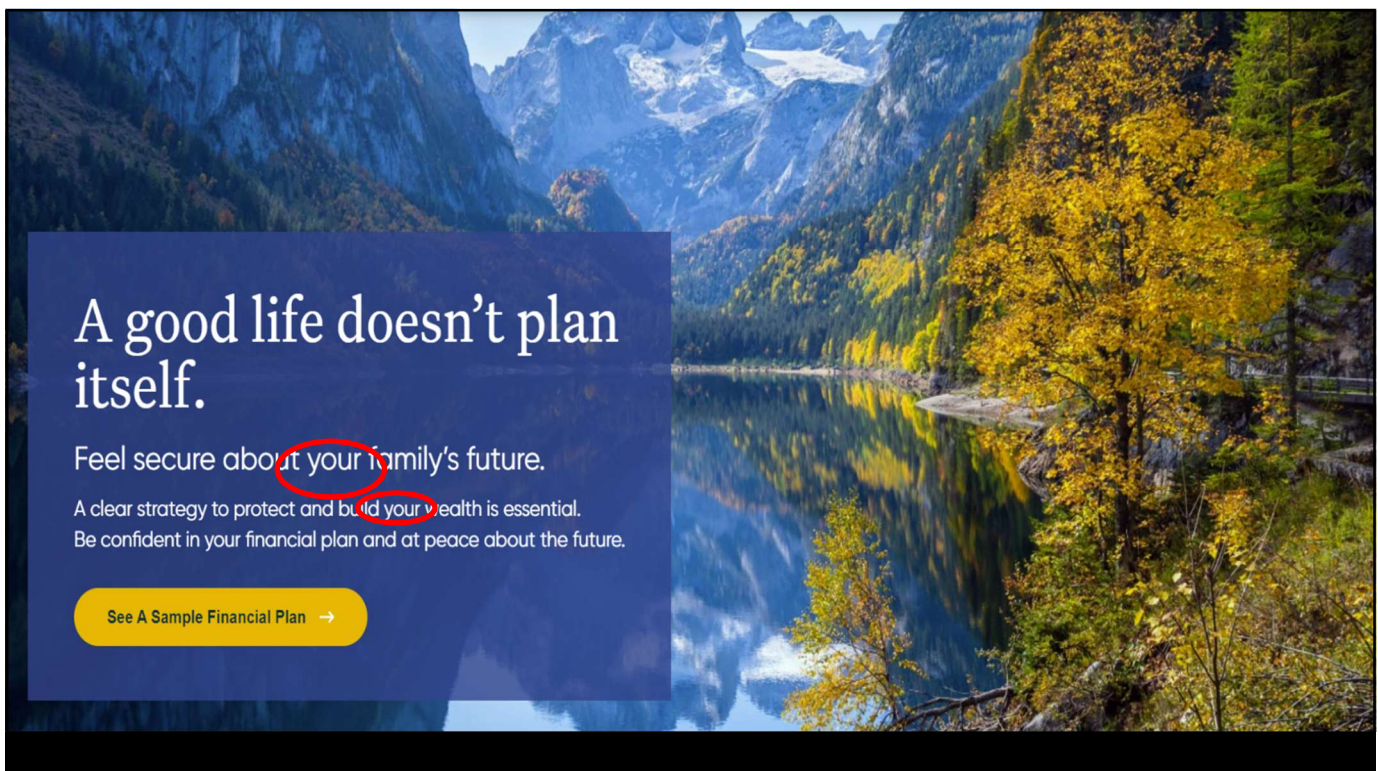
TAKE THE NEXT STEP

Kent Binning
Suncrest Advisors

YOUR VISION, YOUR VALUES. OUR GUIDANCE.

SUNCREST ADVISORS

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A good life doesn't plan itself.

Feel secure about your family's future.

A clear strategy to protect and build your wealth is essential.
Be confident in your financial plan and at peace about the future.

[See A Sample Financial Plan →](#)

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ACTION



PRODUCTION _____

DIRECTOR _____

CAMERA _____

DATE _____ SCENE _____ TAKE _____

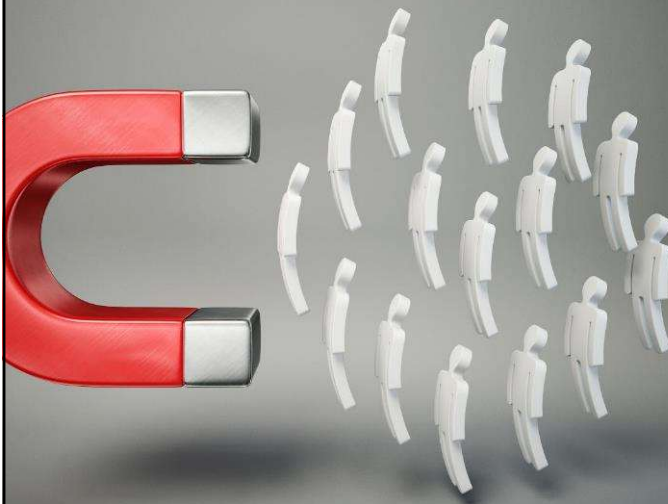
ACTION TAKEAWAY #1

Craft your message with your *prospects* and *clients* as the *heroes* and you as the *guide*.

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Communicate Your Value Proposition

To *Attract* the Right People



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Communicate Your Value Proposition

Repel the Wrong People

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Communicate Your Value Proposition

Create *Action!* (CTA)

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22

ACTION



PRODUCTION _____

DIRECTOR _____

CAMERA _____

DATE _____ SCENE _____ TAKE _____

ACTION TAKEAWAY #2

Craft your message to *attract* your ideal clients... to *repel* the rest... and to *create action*!

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Do you want the slides?

Get me your email address on a business card or **written clearly**.

BillCates@ReferralCoach.com

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YOUR SHORT COURSE IN **Brain Science**

The Neuroscience of Relevance



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Our brains are scanning...

6 Times Per Second
Am I Safe?

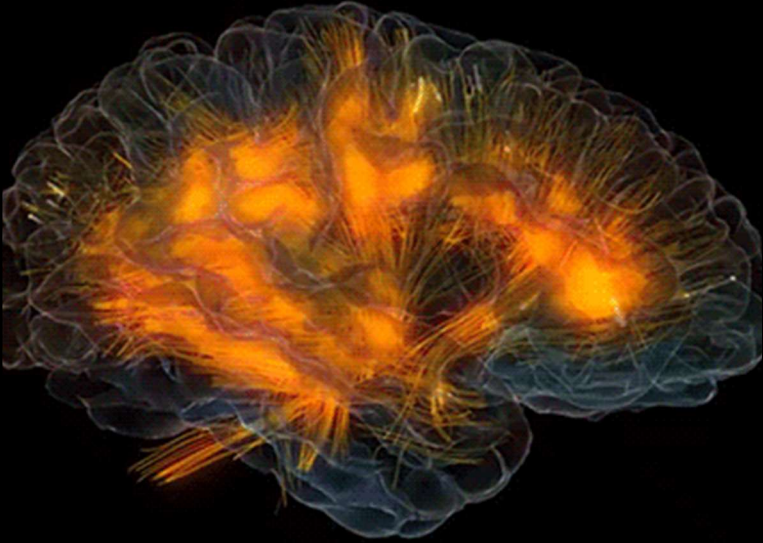
3 Times Per Second
**Is There an
Opportunity?**

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The Neuroscience of Decision Making

A brain scanning methodology called **magnetic resonance tomography**, or **MRT**, shows the part of the brain that is active during a decision making process.

“Subjects who could not feel emotions, could not make decisions.”


Antonio Damasio, Neuroscientist

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Kent Binning
Suncrest Advisors

Emotion makes the sale and logic pays the premium.

If you lead with logic you're in trouble.

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Clint Sands
Pinnacle Wealth Strategies

I go deep with my clients to help them understand the ramifications of not making the right decision.

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ACTION



PRODUCTION _____

DIRECTOR _____

CAMERA _____


DATE _____ SCENE _____ TAKE _____

ACTION TAKEAWAY #3

Make sure your messaging strikes an emotional chord.

Address their fears, concerns, and aspirations.

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The purpose of our brains:

1. Keep us alive (safe).
2. Conserve energy.
3. Move toward **clarity**.

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Creating Action Through Clarity

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Creating Action Through
Clarity

PROSPECT CLARITY

On Your Process for
Becoming a Client

What Its Like to Work with You

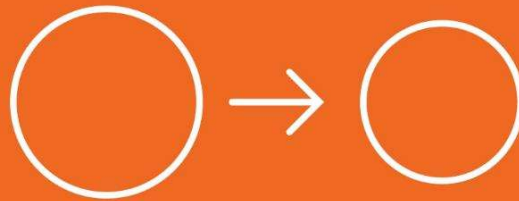
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Cognitive Fluency Defined



The easier information is to process, the more we are inclined to like it, find it attractive, and believe it to be true.

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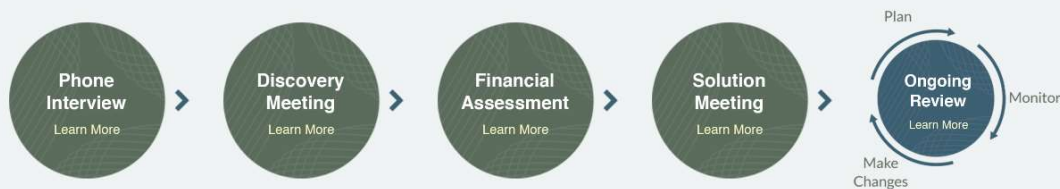
Jason Jenkins
Simplicity Group

People want to know
exactly what to do!
Simple and Clear!

35

Wealth Management Process

Our wealth management process is designed to ensure your finances are expertly aligned with your goals and values. We review every major aspect of your financial life, identify areas of concern, and devise and implement solutions in conjunction with your tax and legal advisors.



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OUR PROCESS

PLEASE CLICK ON A STEP TO LEARN MORE ABOUT OUR PROCESS.

INTRO CALL INITIAL CONSULT CASE DESIGN STRATEGY SESSION PLAN DELIVERY & IMPLEMENTATION ON-GOING ADVICE

INTRO CALL - ESTIMATED TIME: 30 MINUTES

TOPICS

- Get to know each other
- Discuss your planning concerns
- Explain who we are and how we work with clients
- Provide an overview of the process
- Confidential questionnaire emailed directly to you

Daniel Burke, CFP, ChFC
Burke Financial

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Our Process

A GPS is a helpful tool that can navigate you safely to your desired destination. Think of our team like a GPS system for your retirement. Click on each step to learn more.

[Contact Us](#)

Discovery Risk Assessment Customized Roadmap Course Correction Dynamic Guidance

Paul Coles, CFF
Alliance Wealth Advisors

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ACTION

ACTION TAKEAWAY #4

Illustrate and discuss the process for becoming your client and beyond.

PRODUCTION _____

DIRECTOR _____

CAMERA _____

DATE SCENE TAKE

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Creating Action Through Clarity

YOUR CLARITY

Who is a Right-Fit Client™ for you?

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Clint Sands
Pinnacle Wealth Strategies

Our biggest bullseye is orthodontists.

We recently had a booth at a conference. The investment paid for itself many times over.

42



Paul Coles
Alliance Wealth Advisors

We have a lot of mini niches.

If you can become a name at the water cooler, then 90% of the sale is done.

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Types of Viable Target Markets

Businesses within
a Specific Industry
(Narrower the Better)



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Types of Viable Target Markets

Medical Practices or Professionals

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Types of Viable Target Markets

Large Companies (One or Two Categories)

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Types of Viable Target Markets

Colleges and Universities
(Faculty & Administrators)

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Types of Viable Target Markets

Affinity Groups

- Families with Children with Special Needs
- Philanthropists
- Athletes

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The **Benefits** of a
Clear Target Market

7 Huge Client
Attraction
Benefits

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The **Benefits** of a
Clear Target Market

You know their world
better, so you're able to
bring better solutions to
their problems.

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The **Benefits** of a Clear Target Market

Your **messaging** is much more **relevant** and, therefore, more **effective**.

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The **Benefits** of a Clear Target Market

It's much **easier to identify ideal prospects** when you work in a target market.

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The **Benefits** of a Clear Target Market

Easier to produce **results** using **LinkedIn**.



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The **Benefits** of a Clear Target Market

You can **join forces** with other **centers of influence** who also work in your target market.

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The **Benefits** of a Clear Target Market

Expand the **geographic reach** of your business.


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The **Benefits** of a Clear Target Market

Much easier to **create a reputation**, as well as generate more **referrals** and **introductions**.

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To Target or Not to Target?

1. My current clients?
2. Missed opportunities?

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Characteristics of a Profitable Target Market

- Large Enough
- Financial Capacity
- Stable or Growing
- Enjoyable / Gratifying
- Network of COIs
- Formal & Informal Communication

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Target Market

Heavy Construction



Todd McDonald

“Early in my career, I asked top producers, ‘If you were able to start over, what would you do differently?’

The most common answer was to ‘focus on a target market.’”

TopAdvisorPodcast.com

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518-220-3061 | tmdonald@financialguide.com



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Target Market

Optometrists



Adam Cmejla, CFP



TOP ADVISOR


PODCAST

With **Bill Cates, CSP, CPAE**

EPISODE #3
TopAdvisorPodcast.com

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Helping optometrists plan life.
On purpose.



Our Process

Wealth management requires a multi-faceted strategy. By understanding every facet of your financial goals, we develop a plan that meets your expectations while providing long-term peace of mind.


[Learn More](#)



Who We Are

A firm dedicated to providing sound, fundamental financial advice designed to satisfy your unique goals.

[Learn More](#)



Who We Serve

Meeting the essential personal and practice financial planning needs of optometrists and practice owners around the country.

[Learn More](#)

Enjoy Our Free eBooks and Webinars

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[FREE WEBINARS](#)

Stay Up-to-date and Informed!
Info in your inbox

*Privacy policy: We hate SPAM and promise to keep your email address safe.

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Target Market

Optometrists



Adam Cmejla, CFP

“Since making the decision to go “all in” and exclusively serve optometrists, **my only regret is not doing this five years ago!** As I’ve become exclusive, opportunities have become greater and greater in both quality and quantity

EPISODE #3

TopAdvisorPodcast.com

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Target Market

Optometrists



Adam Cmejla, CFP



EPISODE #3

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Target Market

Focus on the Tech Industry



Malcolm Ethridge, CFP®, CRPC®



TOP ADVISOR


PODCAST

With **Bill Cates, CSP, CPAE**

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MALCOLM ETHRIDGE

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Customized Financial Planning Services for Senior Managers, Executives, and Small Business Owners in Technology

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Target Market

Philanthropic Community



Jeff Chaddock
\$4.5 Billion AUM

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Target Market

Philanthropic Community



Jeff Chaddock
\$4.5 Billion AUM

“Philanthropy is in my DNA. I attract clients who share this trait and I help clients discover how they can become more involved through what I call philanthropic leadership.”

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Target Market
High Tech / Google



Don Hilario



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Target Market
High Tech / Google



Don Hilario



Financial Planning for
Big Tech & Beyond

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Target Market

High Tech / Google



Don Hilario

“By building a reputation among Googlers, prospects come to me saying, ‘I’ve heard great things about you. You were highly recommended. I know you work with people just like me.’ ■ ■ ■

EPISODE #23

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71

Target Market

High Tech / Google



Don Hilario

“Having a very clear target market strategy can earn you validation, credibility, and immediate trust as an advisor”

EPISODE #23

TopAdvisorPodcast.com

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ACTION

ACTION TAKEAWAY #5



PRODUCTION _____

DIRECTOR _____

CAMERA _____

DATE

SCENE

TAKE

Build a reputation
that draws ideal
clients to you.

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If your message isn't
radically relevant,
you'll be...

IGNORED!

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