



Becoming Radically RELEVANT

Bill Cates, CSP, CPAE
Referral Coach International

BREAKOUT SESSION



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Creating Action Through Clarity

YOUR CLARITY

Who is a Right-Fit Client™ for you?



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YOUR RIGHT FIT CLIENT

Demographics

- Assets / Income
- Age / Gender
- Marriage / Family
- Employer
- Industry
- What else?

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YOUR RIGHT FIT CLIENT

Psychographics

- Concerns / Fears
- Challenges
- Opportunities
- Aspirations
- Open to Advice
- What else?

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Buyer Persona

A semi-fictional representation of your Right-Fit Client™ based on your current client base or research into a new target market.

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Edward

Executive Vice President
Fortune 500 Company

Basics

- Age 58
- Married / Grown Children
- College Degree
- About 10 Years from Retirement
- Define Benefit Plan
- Owns Company Stock

Behaviors

- Works Hard & Plays Hard
- Loves to Travel
- Visits Their Grandchildren
- Currently Has an Advisor

Concerns / Frustrations

- His Money Isn't Working Hard Enough
- High Tax Bracket
- Retire without Compromising Lifestyle

Aspirations / Motivators

- Travel
- Leave a Legacy
- Philanthropy

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Clear Intentions
Produce **Clear**
Results!

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Value Positioning Statement



I specialize in...

Displays confidence w/o feeding into preconceived notions.

I/We work with...

Qualifies and/or demonstrates your target market.

who want to...

Speaks to the benefits (which can create empathy & curiosity).

For example...

Brings everything to life; makes it tangible; creates emotion.

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Example #1 – Vince (Connecticut)

I specialize in financial planning for business owners.

I/We work with successful, fast-past entrepreneurs

who want to focus on what they do best – running their business and making money.

Value in Action I'm like a financial quarterback for my client. I put the right team in place to make sure they have all the right insurance in place, a benefits package that helps them retain their best employees, and that all their investments are working as hard as possible for them.

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Example #2 – Gerry (California)

My expertise is in providing safe, guaranteed retirement income for my clients.

I/We work with professionals and executives, 55-70

who want to who want to have a worry-free retirement.

Value in Action For example, I recently met with a new client, studied his portfolio, ran my ideas through our retirement income planning software. When I showed him that he could meet his needs and wants, guaranteed for life, he sat up and exclaimed, “What a relief!”

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Example #3 – Anna (Florida)

My expertise is financial and estate planning.

I/We work with Individuals and families who have net worth over 10 million dollars or more

who want to make sure that they don't just prepare the money for the family, but prepare the family for the money?

Value in Action For example, we had a younger client who has three children. He established a coordinated family meeting, that not only brought the family together as a tighter unit, but also helped educate the children on the responsibility of their inheritance, to their family and to the communities around them.

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Example #4 – Mike (Iowa)

My expertise is retirement income planning.

I/We work with individuals and couples between the ages of 55-75

who want to have the confidence and clarity they can retire comfortably, prepared for any challenges that could come up along the way.

Value in Action For example, Bob and Martha came in when they were 55. They discovered that if they made a couple changes, they would be able to retire at 62, instead of 65, like they had been planning. As you might imagine, were ecstatic.



How About for You?

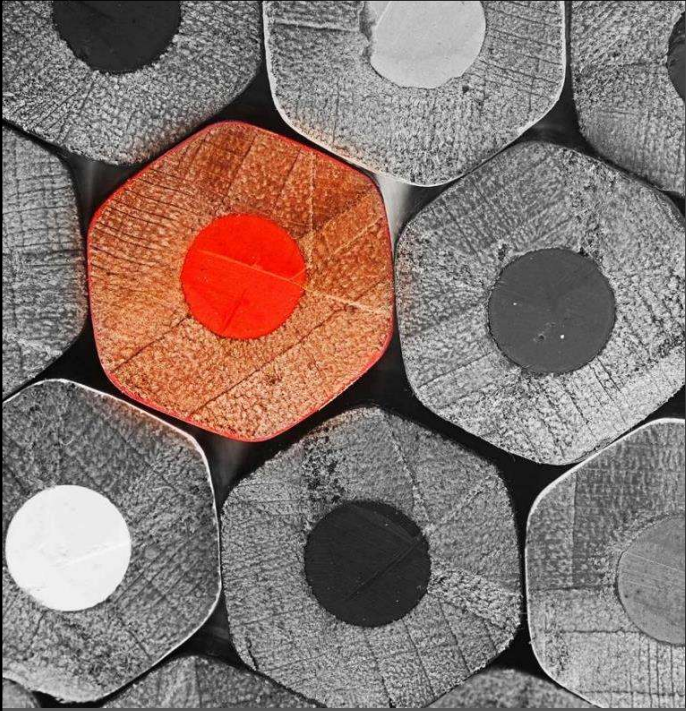
I specialize in _____

I work with _____

who want _____

For example...





What Makes **YOU** Different?

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These are not strong differentiators.

1. You get to know your clients.
2. Your great client service.
3. Your customized solutions.
4. You teach your clients.
5. Your clients can trust you.

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Sources of Differentiation

1. Target Market
2. Special Expertise
3. Special Process for Uncovering Gaps or Problems
4. Process for Continually Adding Value
5. What Else? Not sure? Ask Your Clients

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Brent Fewox
Anthem Financial Services

Our clients tell us what makes us different.

“We’ve never had an advisor before that treated us like family.”

“You do things that help us feel good about ourselves.”

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RULE #5

Only differences that matter,
matter. You must...
... draw a straight line
to the **benefit**.



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Please don't keep
the important work
I do a secret!

Okay. What do you
want me to say about
you to others?

Encouraging Better Word of Mouth

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The Tee Box Value Positioning Statement


1. Easy to Remember
2. Relevant to Prospect
3. Creates Action

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The Tee Box Value Positioning Statement

1. **Who You Serve**
If you are...
2. **What They Want**
You want to...
3. **Call to Action**
You need to meet...

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If you are an **established financial advisor** and you'd like to **gain more ideal clients**, you **need to talk to** Bill Cates.

Shall I make an introduction?



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If you're **several years away from retirement** and you want to **retire without taking a pay cut** you **need to talk to** Peter Smith.
Shall I make an introduction?



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If you're **between 30 and 50** and **have children** and you want help to **grow your wealth** you **need to speak with** Francis Jenkins.
Shall I make an introduction?




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1. **Who You Serve**
If you are...
2. **What They Want**
You want to...
3. **Call to Action**
*You need to meet...
Shall I introduce you?*

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ASK THE COACH

Questions? Comments?

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