

# BILL CATES

Hall of Fame **Business Keynote Speaker**



For over 30 years, Bill Cates has been helping **financial professionals & firms** tap into **exponential growth** through:

- \* Focused **Messaging**
- \* Maximizing Client **Engagement**
- \* Leveraging **Relationships**



**BILL CATES**  
RELATIONSHIP MARKETING SYSTEM

[www.BillCates.com](http://www.BillCates.com)

[BillCates@referralcoach.com](mailto:BillCates@referralcoach.com) | 301.497.2200

“Bill gave us  
the **perfect blend**  
**of content, humor**  
**and motivation.**

I watched our  
members go from  
taking notes, to  
nodding, to  
laughing.”

**Bonnie Godsman, CPBC**

*President at Finseca / GAMA Global*



**Your Top People Deserve to Hear from a Top Speaker!**  
Contact Bill Cates Today ([BillCates@referralcoach.com](mailto:BillCates@referralcoach.com))

# WHY HIRE BILL CATES?



## Focus Your Messaging | Maximize Engagement Leverage Your Relationships



Take the risk out of hiring a speaker for your next conference! Hall of Fame Business Keynote Speaker Bill Cates, CSP, CPAE will work with you to deliver **dynamic keynotes and workshops** that are **customized for your group** and *designed to inspire action*.

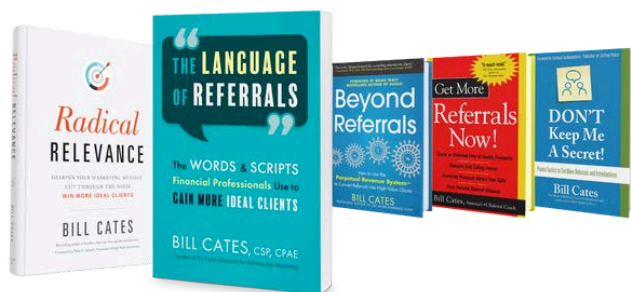
Clients love hiring Bill because:

- His programs are **high-energy and high-content** ... wrapped in a little bit of *humor and fun!*
- Bill is the type of speaker who prefers to talk *with* his audience instead of at them. Therefore, you can expect an **interactive and engaging** session.
- His programs are filled with **practical strategies** that will have an *immediate impact on your business*.

## Bestselling Author, Coach, Acclaimed Podcast Host and Relationship Marketing Expert

For over 25 years, Bill Cates has been helping professionals & companies grow their businesses exponentially by leveraging the power of referrals, introductions, and communicating compelling value. Bill has 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 *Get More Referrals Now*, *Beyond Referrals*, *Radical Relevance*, and his popular new release – *The Language of Referrals*. He is also the host of the acclaimed **Top Advisor Podcast**.



To learn more about Bill's books, visit: [amazon.com/author/billcates](https://amazon.com/author/billcates). Check out Top Advisor Podcast on your favorite podcasting platform, or visit [TopAdvisorPodcast.com](https://TopAdvisorPodcast.com).

# POPULAR KEYNOTE TOPICS

Typically **45 – 90 minutes** in length, all of Bill's sessions (whether live or virtual) are always **customized** to the unique needs and goals of his audience. Keynotes can also be coupled with a **breakout session** to take a deeper dive into particular topics and strategies.



## Radical Relevance

Sharpen Your Value Proposition  
Cut Through the Noise  
Win More Ideal Clients



Your prospects and clients are bombarded with messages from all directions. You must hit the bullseye in their brain with messaging that is radically relevant to grab their attention and critically compelling to move them to take meaningful action. How you perceive, believe in, and communicate your value is fundamental to your success.

### IT'S TIME FOR YOU TO DISCOVER:

- A simple way to communicate your differentiation that matters to your prospects.
- The effectiveness of a well-defined target market and how to choose one.
- How to message your value to hit the bullseye and attract only Right-Fit Clients™.
- A 3-step process to discover your full value and bring everyone in your organization onboard with the right value messaging.
- 3 critical elements of a compelling value proposition that move people to meaningful action.

NOT a tricky elevator speech! A genuine way to express your value that will resonate with your prospects, clients, and centers of influence. The result? More ideal clients!

### ***Be Relevant or Be Ignored!***

“ *The feedback from Radical Relevance in all 4 cities is overwhelmingly positive. This was a wakeup call for our members. We're already getting reports of specific results.* ”



Adam McCann, MDRT Australia



# POPULAR KEYNOTE TOPICS

(continued)



## Multiply Your Best Clients for Exponential Growth

Enhance Client Engagement | Leverage Your Value | Secure Solid Introductions

Client satisfaction and loyalty are critical to the stability of your business. But it's client leverage that turns incremental growth into exponential growth. In this unique session, you will receive the blueprint for building a thriving business based on a culture of referrals and personal introductions.

### IT'S TIME FOR YOU TO DISCOVER:

- Why client satisfaction and loyalty are not enough for the growth you want.
- How to enhance client engagement to become super referable.
- 5 ways to promote introductions to receive them without asking.
- How to ask for introductions without pushing or begging.
- How to get "referred up" to higher-level prospects.
- What it takes to turn a referral into a solid introduction, so prospects are eager to hear from you, and receptive to an appointment.
- How to tap into the power of your "Client-Focused Why" (your secret weapon).

It's time to start meeting your prospects how they want to meet you – through an introduction from someone they already trust. Follow the road map that Bill provides and you'll be well on your way to accelerating the growth of your business.

**Go from incremental growth to EXPONENTIAL GROWTH!**

“ Bill was one of the best motivational speakers we've hired, by far. Our agents walked away feeling like they experienced a paradigm shift. ”



Craig Parr, VP of Sales - Illinois Mutual

# POPULAR KEYNOTE TOPICS

(continued)



## The Language of Referrals

Precisely What to Say to Multiply Your Best Clients with Personal Introductions

Generating more referrals and personal introductions is not rocket science; it's all about having a proven process and the confidence to use that process consistently.

This session will provide you with an exact blueprint to leverage your great client relationships that will turn your incremental growth into exponential growth.

### IN THIS HIGHLY TACTICAL AND ENERGETIC SESSION, YOU WILL DISCOVER:

- Precisely what to do and say to become super referable.
- 5 ways to promote introductions and jumpstart unsolicited referrals.
- The words that work when asking for introductions (without pushing or begging!).
- What to say to get referred up to higher-level clients.
- Precisely what to say to turn referrals into solid introductions, so prospects are eager to hear from you and, sometimes, motivated to call you.

The words and sample conversations provided are designed for you to adapt them to your personality and business model. You will remain true to your own style.

***Client Multiplication = Exponential Growth Over the Lifetime of Your Career***

“ One of the owners of our company just told me that he took more notes during Bill's presentation than he's ever taken ... and we've had some big name speakers! ”



Steve Dorfman, CXO - Apex Home Loans

# POPULAR KEYNOTE TOPICS

*(continued)*



## Your Riches Are In Niches

Move from Prospecting to Marketing ~ Attract Ideal Clients in a Lucrative Target Market

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.
- 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.***

# POPULAR KEYNOTE TOPICS

(continued)



## Are You Playing to Win?

Close the Gap between Where You Are and Where You'd Like to Be

Successful people do what the less successful are unwilling to do. Success in every endeavor, therefore, boils down to confidence. In the absence of confidence is doubt, fear, and inaction. You can't take your performance to "the next level" unless you are clear on what that next level is and then willing to take meaningful action.

### IT'S TIME FOR YOU TO DISCOVER:

- 3 strategies to create a crystal-clear vision of your "next level."
- A surefire method to discover your blind spots, limiting beliefs, and mistaken assumptions that sabotage you reaching your full potential.
- The "force" necessary to get out of results-zapping inertia.
- How to create an action plan that you'll actually follow.
- The incredible power of Inspirational Accountability™.
- How to enroll others in helping you achieve your goals.

If you limit yourself to what's comfortable, you deny yourself what's possible.

***Remove the Limiting Beliefs that Put a Ceiling on Your Growth!***

“It was amazing. Bill was so well prepared. One our best decisions ever.”



Renee Sumbly, SHRM



"Our people get energized by actionable ideas to build their business. Bill Cates not only has **great motivational and tactical content**, but he is **authentic and easy to work with.**"

**Jonathan Kuttin**  
*CEO, Kuttin Wealth Management*



**Your Top People Deserve to Hear from a Top Speaker!**  
Contact Bill Cates Today ([BillCates@referralcoach.com](mailto:BillCates@referralcoach.com))

# BREAKOUT SESSIONS & WORKSHOPS

- Usually 1 to 3 hours in length
- Always customized to your audience
- Available as live or virtual sessions
- Can be related to a keynote or a different topic



## Popular Seminar Topics

### **Communicate Your Value to Win More Ideal Clients**

*How You Believe In and Communicate Your Value is Fundamental to Your Success*

This workshop will help your team discover how to:

- Craft a value positioning statement that generates interest.
- Communicate your differentiation to attract attention and get our foot in the door.
- Use proven principles of influence to move prospects to action.

### **Become Super Referable to Get Unsolicited Referrals**

*You Must Be Referable in the Eyes of Your Clients and Centers of Influence*

This workshop will help your team discover how to:

- Enhance prospect and client engagement to become referable quickly.
- Creating engaged relationships that turn into advocates.
- Promote introductions to get them without even asking.

### **Ask for Referrals & Introductions without Pushing or Begging**

*Go from Incremental Growth to Exponential by Being Appropriately Proactive*

This workshop will help your team discover how to:

- Understand the right time to ask for introductions.
- Ask with confidence and purpose, but without pushing.
- Get “referred up” to higher-level prospects.

# Popular Seminar Topics *(continued)*

## **Turn Referrals into Introductions and Appointments that Stick**

*Referrals Turn into Results Once Get Introduced to Your New Prospect*

This workshop will help your team discover how to:

- Collaborate with your source for a more effective introduction.
- Determine the introduction method that works best for you.
- Employ a 5-step method to eliminate appointment cancellations.

## **Create Productive Relationships with Centers of Influence**

*Form Your Own Personal Sales Force that Provides You with High-Trust Introductions*

This workshop will help your team discover how to:

- Determine the best centers of influence for your business.
- Enhance engagement to become super referable in their eyes.
- Create quality introductions that turn into appointments.

## **Expand Your Results in a Target Market with a Bullseye**

*Narrowing Your Focus Helps You Stand Out and Attract More Right-Fit Clients™*

This workshop will help your team discover how to:

- Choose a lucrative target market.
- Use principles of visibility marketing to create a reputation.
- Generate more and/or higher-level clients in your market.

## **Build a Sales & Marketing Funnel that Keeps Feeding You Clients**

*Prospecting without Marketing Leads to Burnout and Unsatisfying Results*

This workshop will help your team discover how to:

- Develop one or more value-added “lead magnets” to build your list.
- Create a nurture campaign to build interest.
- Convert interested prospects into clients.

# Popular Seminar Topics *(continued)*

## Maximize Social Event Marketing to Meet High-Level Prospects

*Meeting Great Prospects in a Social Setting Will Create Incremental Growth*

This workshop will help your team discover how to:

- Determine the best type and size events for your business –client-appreciation, special-invitation, and celebration events.
- Invite clients to bring guests that are qualified and interested in meeting you.
- Follow up with clients and guests to produce results.

## Presentation Skills for Seminars and Other Marketing Events

*Communicating with Confidence and Clarity Will Draw High-Level Prospects to You*

This workshop will help your team discover how to:

- Use strong openings to engage your audience from the very beginning.
- Implement proven presentation strategies such as stories, humor, gestures, and audience empathy.
- Develop effective “Calls to Action” to create your desired actions.

**Your top people deserve to hear from a top speaker!**

Contact Bill Cates for availability, fees, and to see how he can help make your next meeting a great one.



[www.BillCatesSpeaking.com](http://www.BillCatesSpeaking.com)

**Office:** 301.497.2200

**Fax:** 443.714.8037

**Email:** [BillCates@referralcoach.com](mailto:BillCates@referralcoach.com)

705 Childs Point Road, Suite 102  
Annapolis, MD 21401

**BILL CATES**  
RELATIONSHIP MARKETING SYSTEM