






Radical RELEVANCE

Bill Cates, CSP, CPAE
Referral Coach International

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



2 Things I Know for Sure



A magnifying glass with a black handle and a silver rim is positioned over a grid background. The lens is focused on a yellow line graph that shows an overall upward trend with some minor fluctuations. The line starts at a low point, rises, dips slightly, rises again, dips slightly, and then rises to its highest point, ending with an arrowhead pointing to the right. In the background, several other black line graphs are visible, all showing a downward trend with similar jagged patterns. The overall scene is dimly lit, with the magnifying glass and the yellow line graph being the primary focus.

HUGE OPPORTUNITY



Al Fox
Financial Advisor
Mt. Laurel, NJ

“ This downturn will become a tremendous opportunity for you to meet and impact scores of people who need your guidance, commitment, and consistent discipline in executing a strategic financial game plan. ”



Diane Bowman, CFA
Financial Advisor
Dallas, TX

“ If I do things right, when other advisors start knocking on my clients’ doors, I won’t have to worry.


Just last week, by calling all of my clients, I’ve brought in \$20mm, with \$6.5mm from just one client. ”

Leadership is helping people make decisions - that are in their best interest - that they wouldn't make without you.





Stand Out and Grow Your Business in a
Volatile Market




“ We are entering a time that could be the greatest prospecting opportunity we've seen in over two decades. ”

That's a pretty bold statement don't you think?

I have been in this business for over 25 years. I've helped advisors stand out and grow in the 2000-2002 correction and the 2007-2009 correction. We have no clue how deep or long this "correction" (if you want to call it that) will last. What I know for sure is that this is huge opportunity for you, if you're prepared to act with courage and conviction.

Financial First Responder
One of my coaching clients, Rob, is into his third round of calls to just about every one of his clients. He told me that one of his clients said, "Rob, you're like a financial first responder. I bet making all these calls is not easy for you."

Rob provided a modest answer, "Well, thank you. I'm certainly not a hero like the real first responders, but I'm not going to do what many advisors are doing right now – either fleeing the scene or frozen in indecision."

FROM BILL CATES, CSP, CPAE 

www.VolatileMarketGrowth.com



Stand Out and Grow Your Business in a
Volatile Market

PHASE I

Helping is the New Selling

Lead with Value Every
Chance You Get



Stand Out and Grow Your Business in a Volatile Market

PHASE I

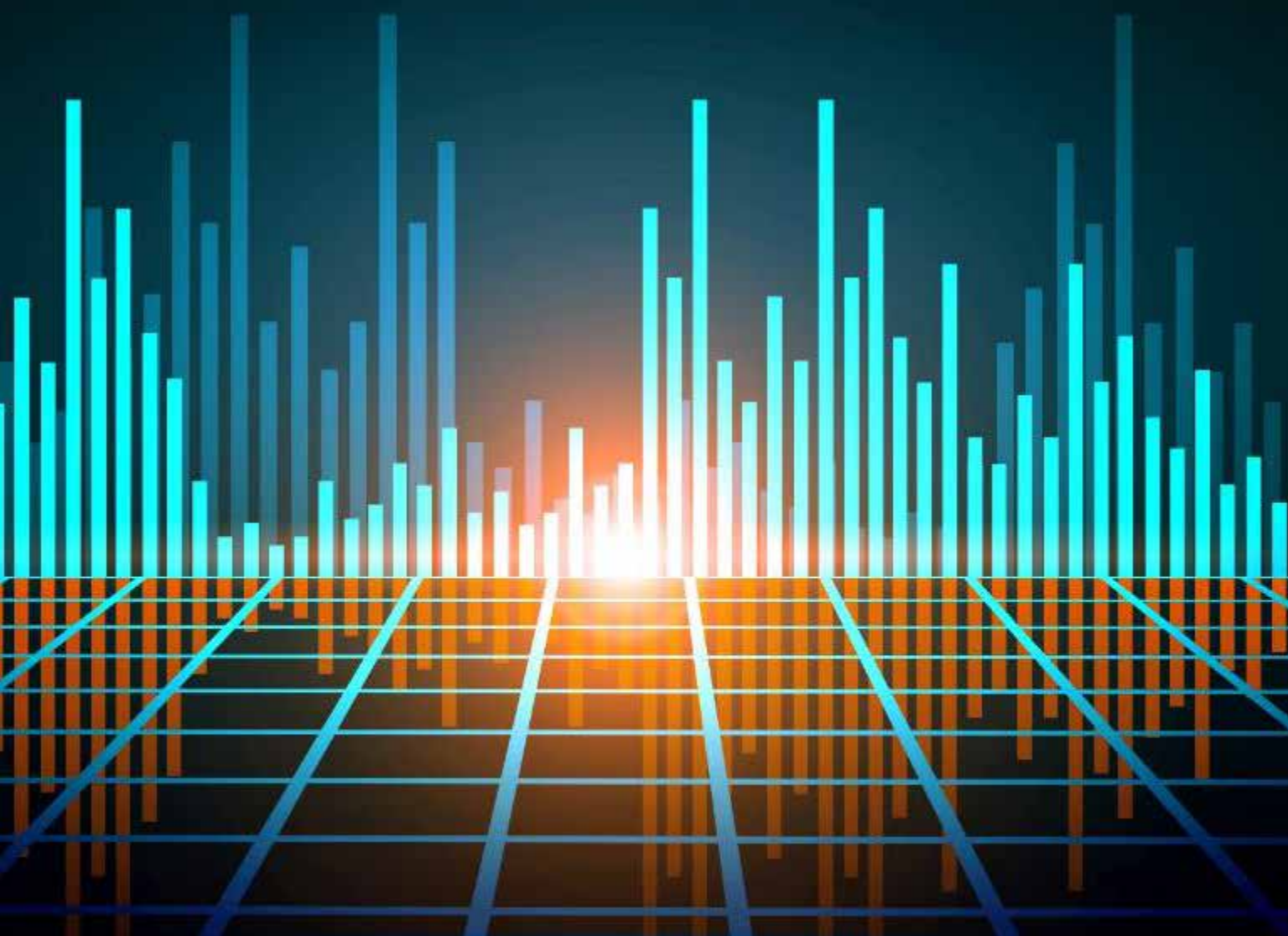
1. Immediately call all of your **A+** clients. Your primary goal is to be an *empathetic* listener.
2. As you are calling your A+ clients, you or your staff can be sending 1:1 email messages to all your other clients.
3. Don't forget the spouse or partner. Even if one spouse tends to take the lead in all of the meetings.
4. Don't limit this effort to your clients. Reach out to some prospects you were courting, plus friends and family.
5. Check in with their other trusted advisors.



PHASE II

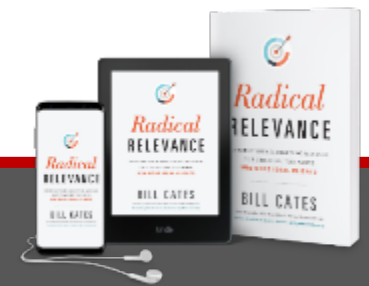
Growth is Good

Put Your Belief in Your
Value to the Test





Teach Your Clients About the Current Environment





Sincere Checking In

“How are
your parents
doing?”





Erin Gay
Financial Advisor
Annapolis, MD

“ My best business growth has always come right after a significant downturn in the market. ”

Now is Not the Time to Retreat! Now is the Time to


BE BOLD

About the important work you do and bring your value to others who are not being served well.

BILL CATES
RELATIONSHIP MARKETING SYSTEM



Stand Out and Grow Your Business in a
Volatile Market




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That's a pretty bold statement don't you think?

I have been in this business for over 25 years. I've helped advisors stand out and grow in the 2000-2002 correction and the 2007-2009 correction. We have no clue how deep or long this "correction" (if you want to call it that) will last. What I know for sure is that this is huge opportunity for you, if you're prepared to act with courage and conviction.

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FROM BILL CATES, CSP, CPAE 

www.VolatileMarketGrowth.com

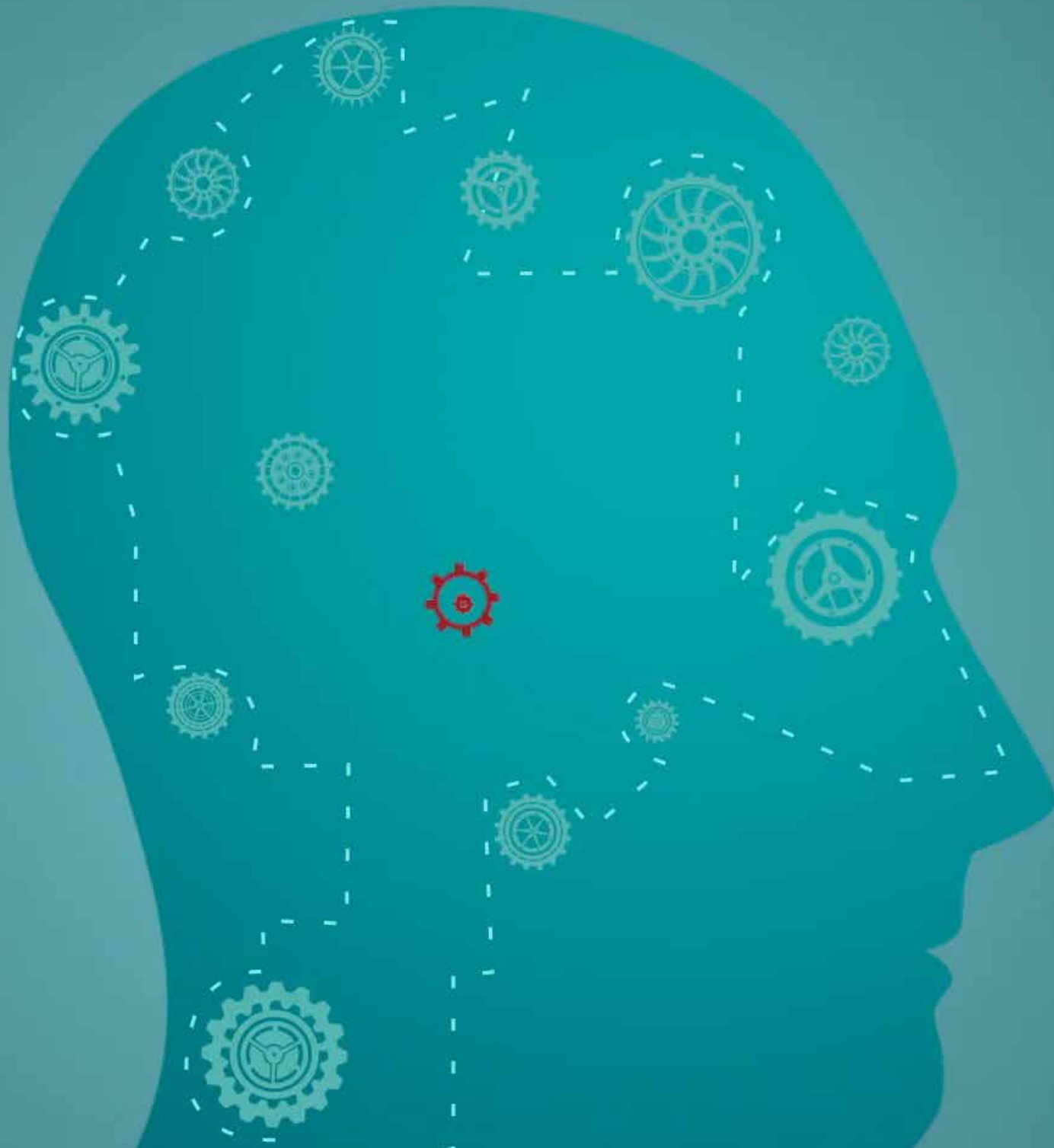




Challenge

Our Prospects' Brains Are Overwhelmed





3,000
Marketing
Messages
Every 24
Hours



How do you get your messages through?



How do standout from others?





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.





Our brains are scanning...

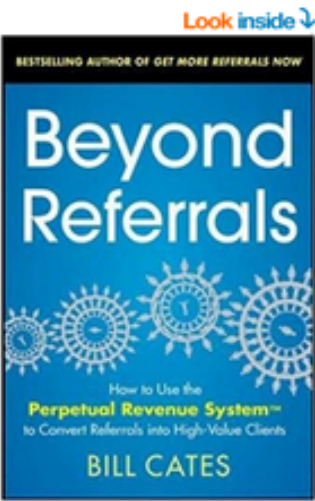
6 Times Per Second
Is it Safe?



3 Times Per Second
Is There an
Opportunity?



We Live in a
Radically
Relevant
World



Beyond Referrals: How to Use the Perpetual Revenue System to Convert Referrals into High-Value Clients Paperback – April 16, 2013

by Bill Cates (Author)

★★★★★ 14 customer reviews

See all 3 formats and editions

Kindle \$9.99 <small>Read with Our Free App</small>	Paperback \$12.36 <small>36 Used from \$1.96 25 New from \$8.67 1 Collectible from \$9.95</small>	Audiobook \$13.97 or 1 credit <small>or 1 credit</small>
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More Introductions! More Appointments! More Clients!

You face four hurdles to gaining new clients: finding enough of the right prospects, getting their attention, making the sale, and multiplying your clients through referrals.

While referrals are important, they're not the endgame. *Beyond Referrals* helps you turn referrals into introductions, appointments, and sales—showing you how to turn referrals into introductions to the prospects who are eager to hear from you. Then, you'll learn proven ways to convert a high percentage of prospects into high-value clients.

"Bill's referral system is being used throughout our company because the results are undeniable. He has truly revolutionized the way our advisors are acquiring new clients through referrals. This book will turbocharge your

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Customers who bought this item also bought





Extreme Relevance?



Pollen Count:

 PHARMACY

9.4
high

LAMAR





The purpose of our brains:

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



Creating Action Through **Clarity**

Simplify the Complicated (Less is Often More)





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!





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



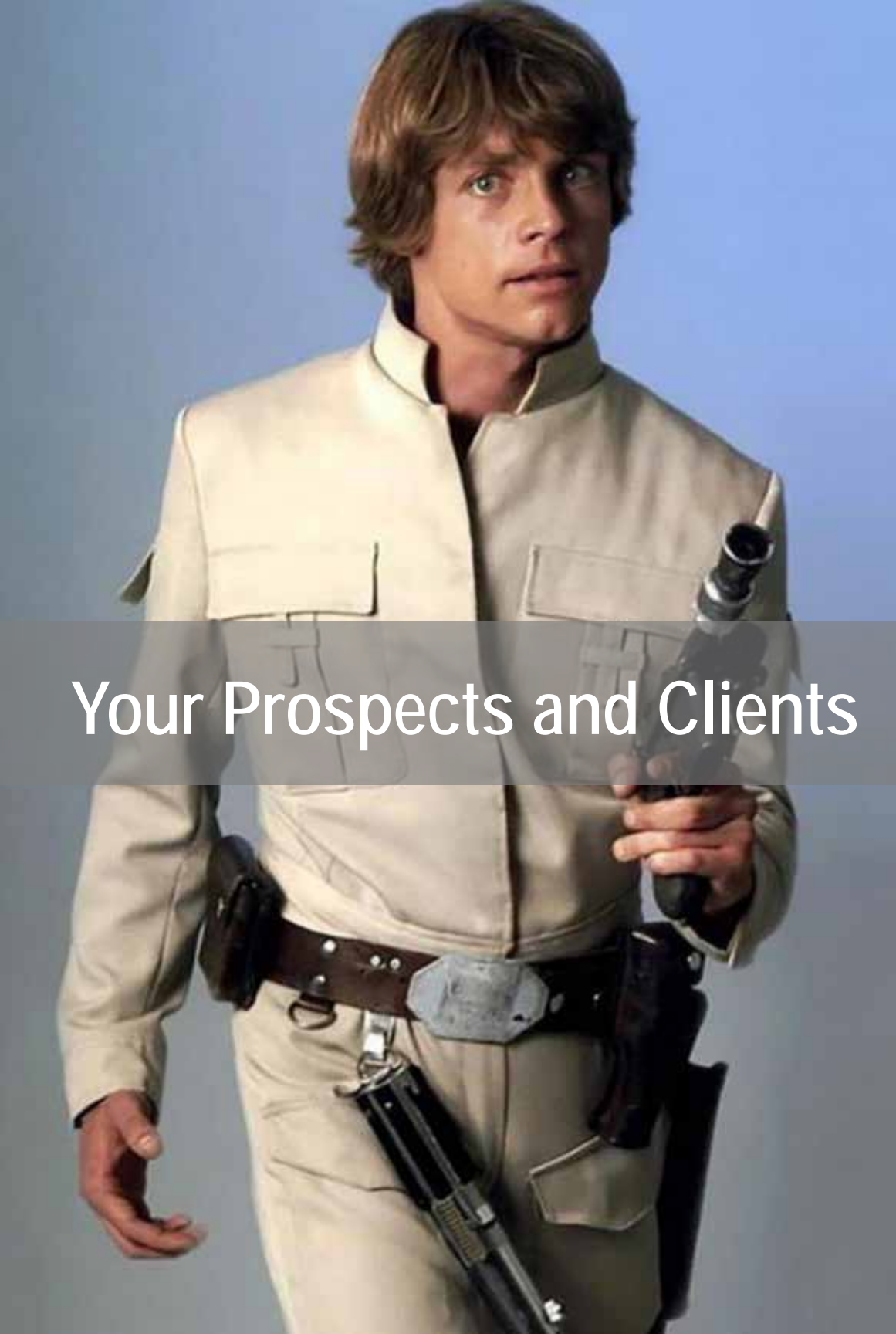


Communicate Your
Value Proposition?

To *Impress*
People



STAR
WARSTM



Your Prospects and Clients



You & Your Team






The Villain



What Villains do You Fight with Your Hero Clients?









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...](#) 

 Referral Coach International

 University of Maryland College Park


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

[Edit public profile & URL](#) 

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Ad ...



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 **John M. Gentry** · 2nd 

Dynamic & Passionate Executive - Who Understands How To Build Distribution

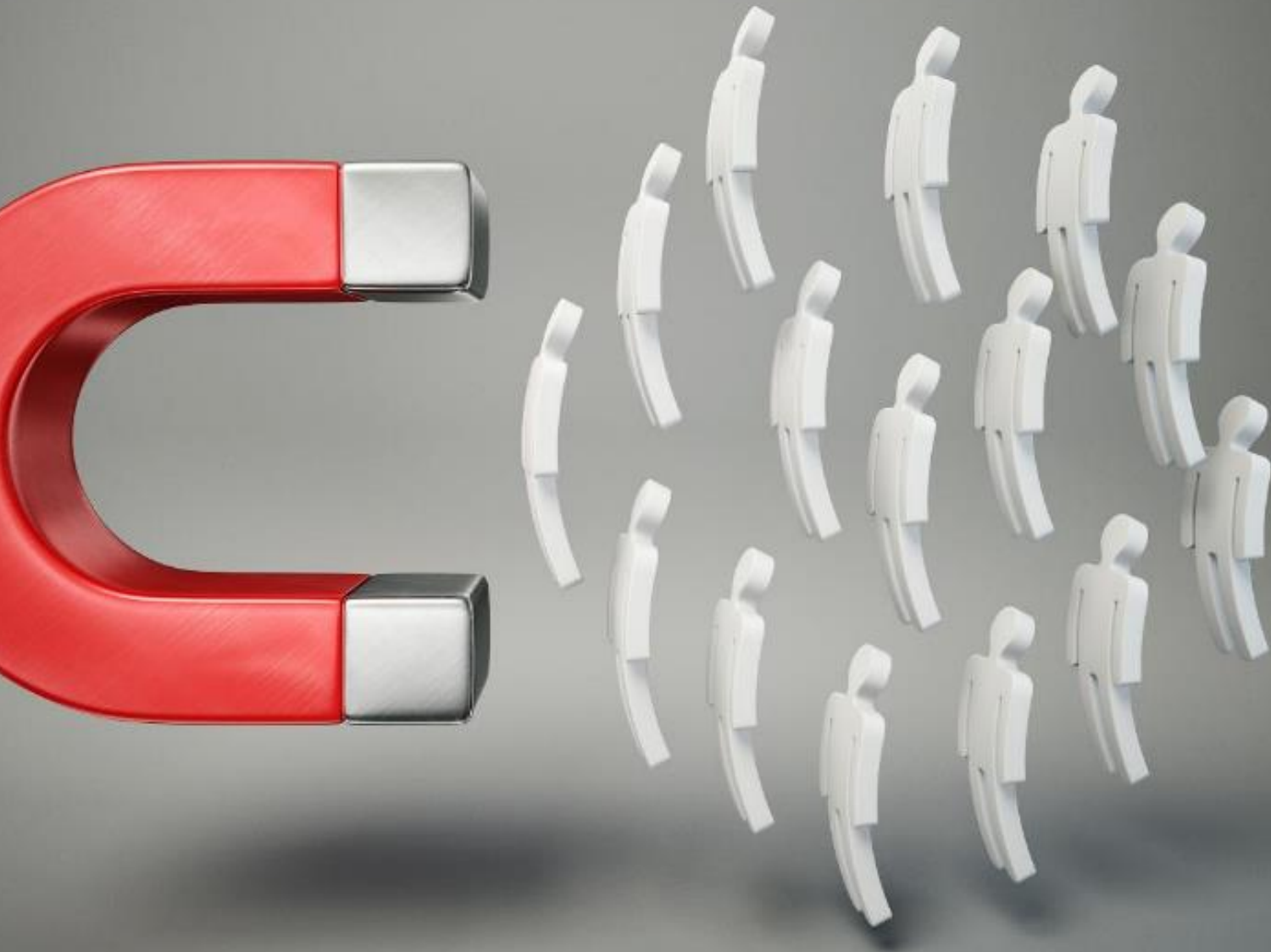
Enough About Me - Let's Talk About YOU

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?



Communicate Your Value Proposition?

To *Attract* the Right People



Communicate Your Value Proposition?

Repel the Wrong People



Communicate Your Value Proposition?

Create *Action!*

- Compelling
- Inspiring
- Persuasive

Time	For	Action
Reply to Your Emails?		
Return Your Voice Mails?		
Follow Your Requests?		



Make Sure All Your Messaging is...

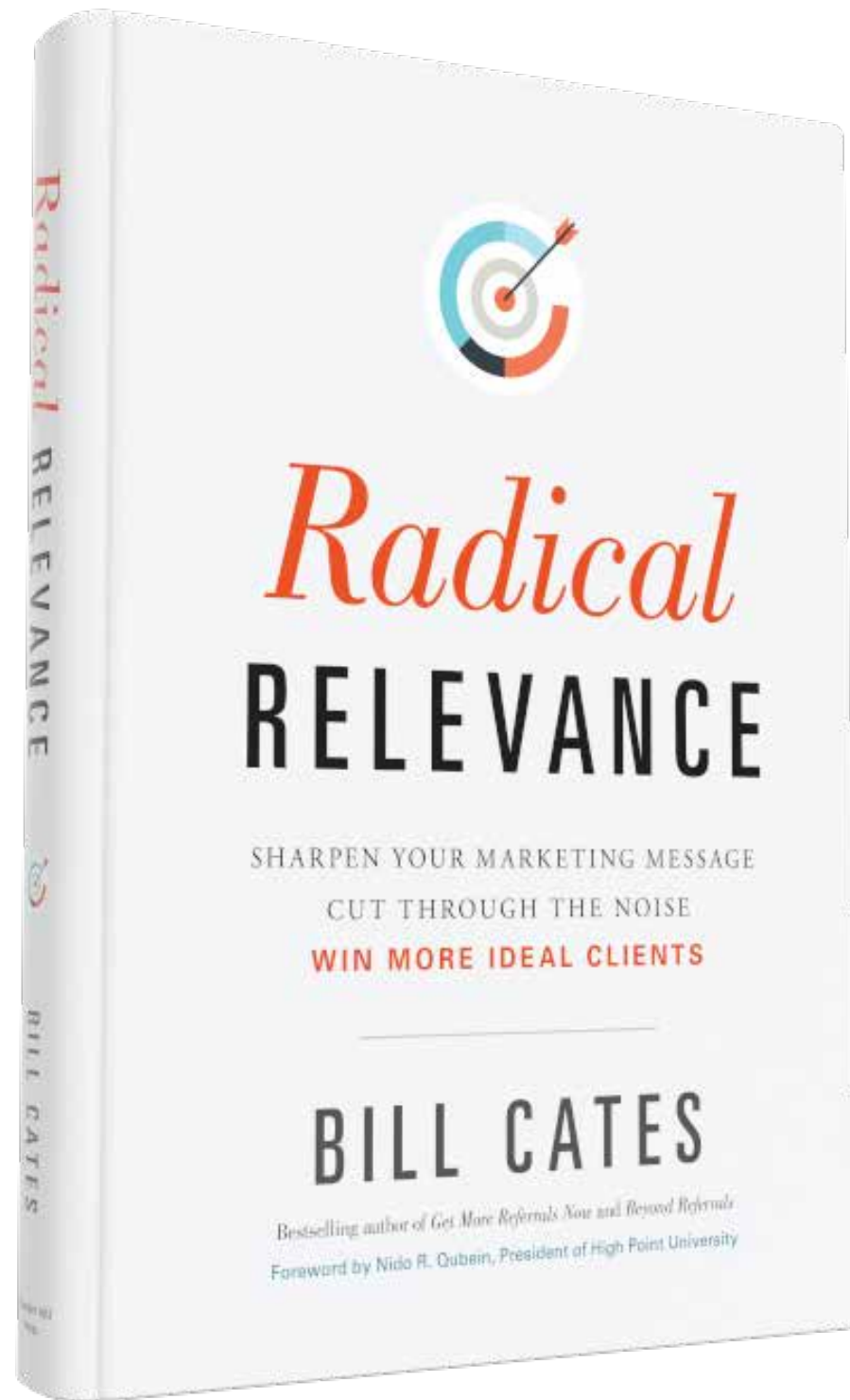


Relevant Enough to Attract the
Attention of Right-Fit Clients

Compelling Enough to Create
Action

Continuing Education Question #1





More Than Just a Book



REGISTER THIS BOOK FOR FREE RESOURCES

Get Instant Access to the Radical Relevance Toolkit*

When you go to www.RadicalRelevanceToolkit.com, you'll find a treasure trove of resources—all designed to help you acquire more Right-Fit Clients™.

Here's a sample of the resources you'll find:

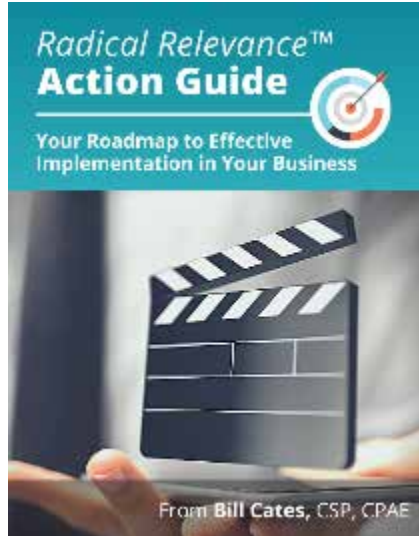
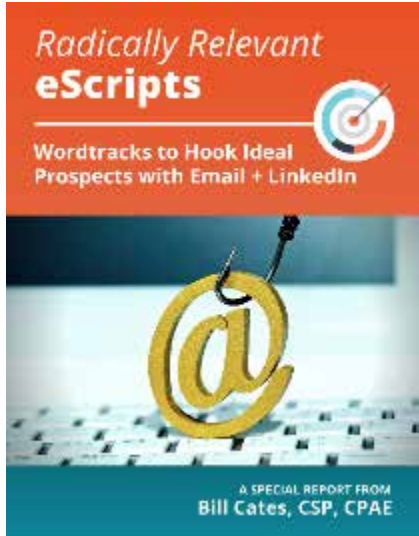
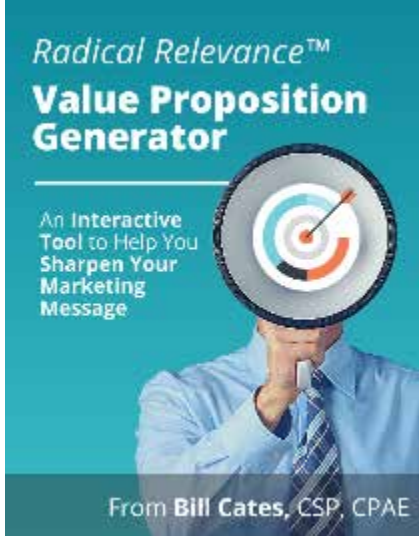
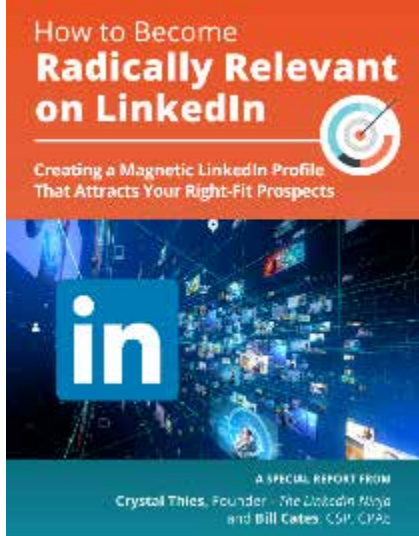
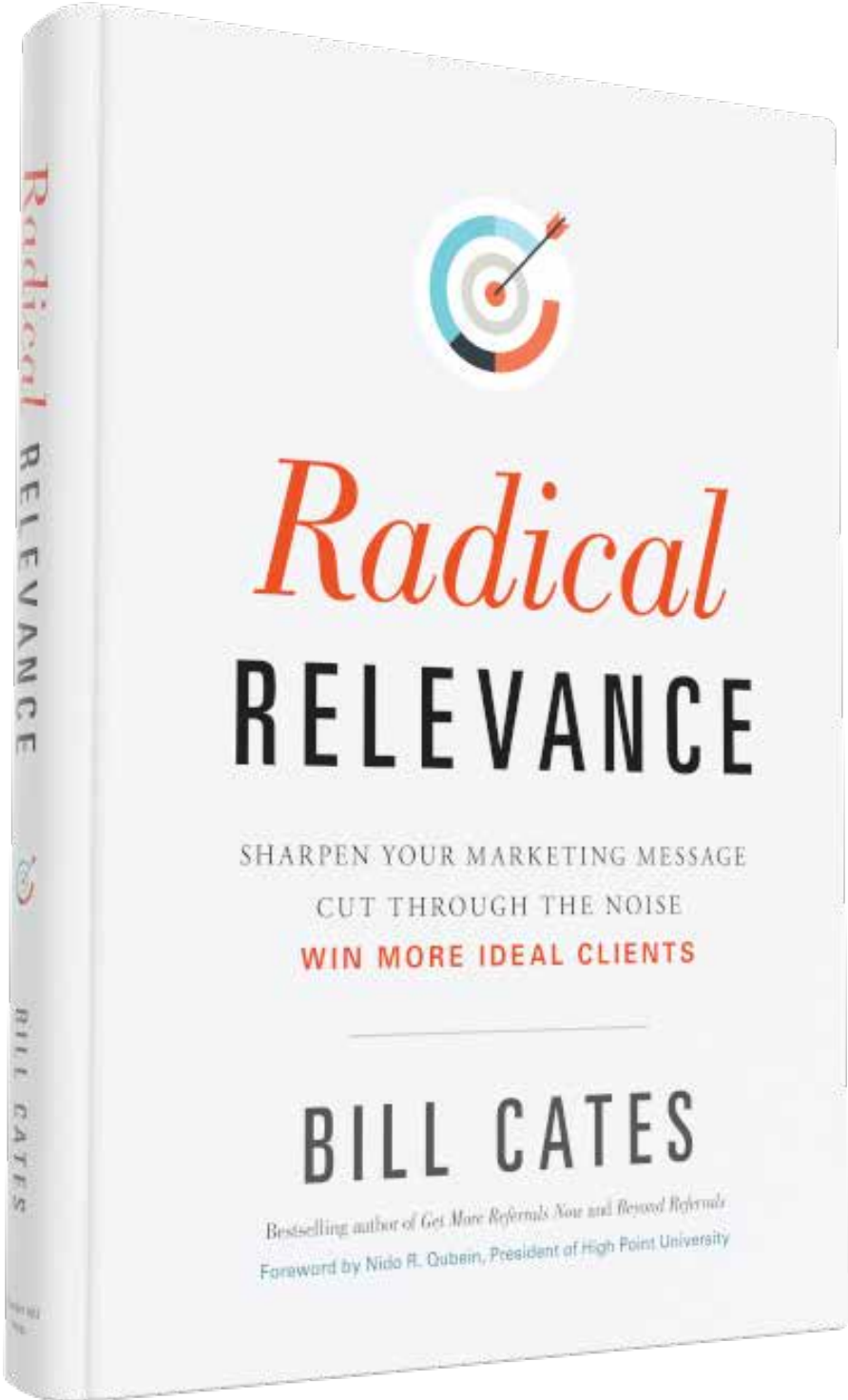
- The Radical Relevance Action Guide
- Creating Your Radically Relevant and Compelling Website
- Creating Your Right-Fit Client™ Personas
- Your Relevant and Compelling Email Messaging Guide
- Creating Your Magnetic LinkedIn Profile

* We add new resources continuously. As a registered owner of this book, you will receive occasional updates alerting you we've added new tools to help you grow your business.

To register, go to: www.RadicalRelevanceToolkit.com



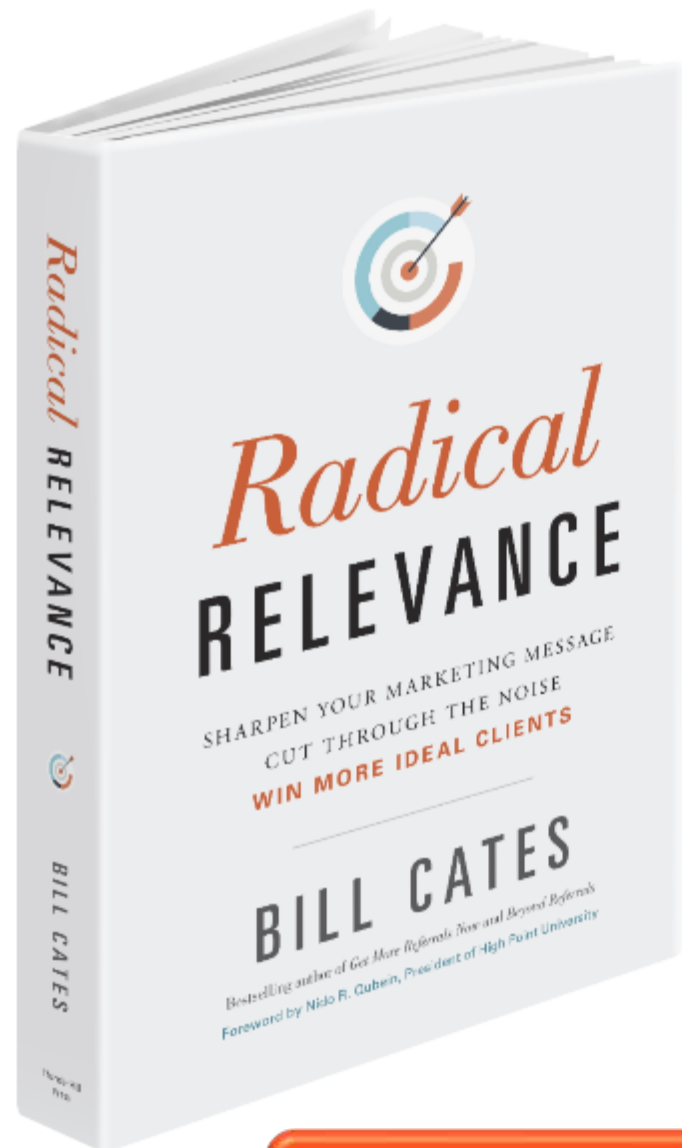
Get FREE Access to the Radical Relevance™ Toolkit



"Radical Relevance" by Bill Cates, CSP, CPAE

Autographed Hardcover Edition (\$24.95 + FREE SHIPPING)

+ BONUS! Radical Relevance Toolkit ([see below for more details](#))



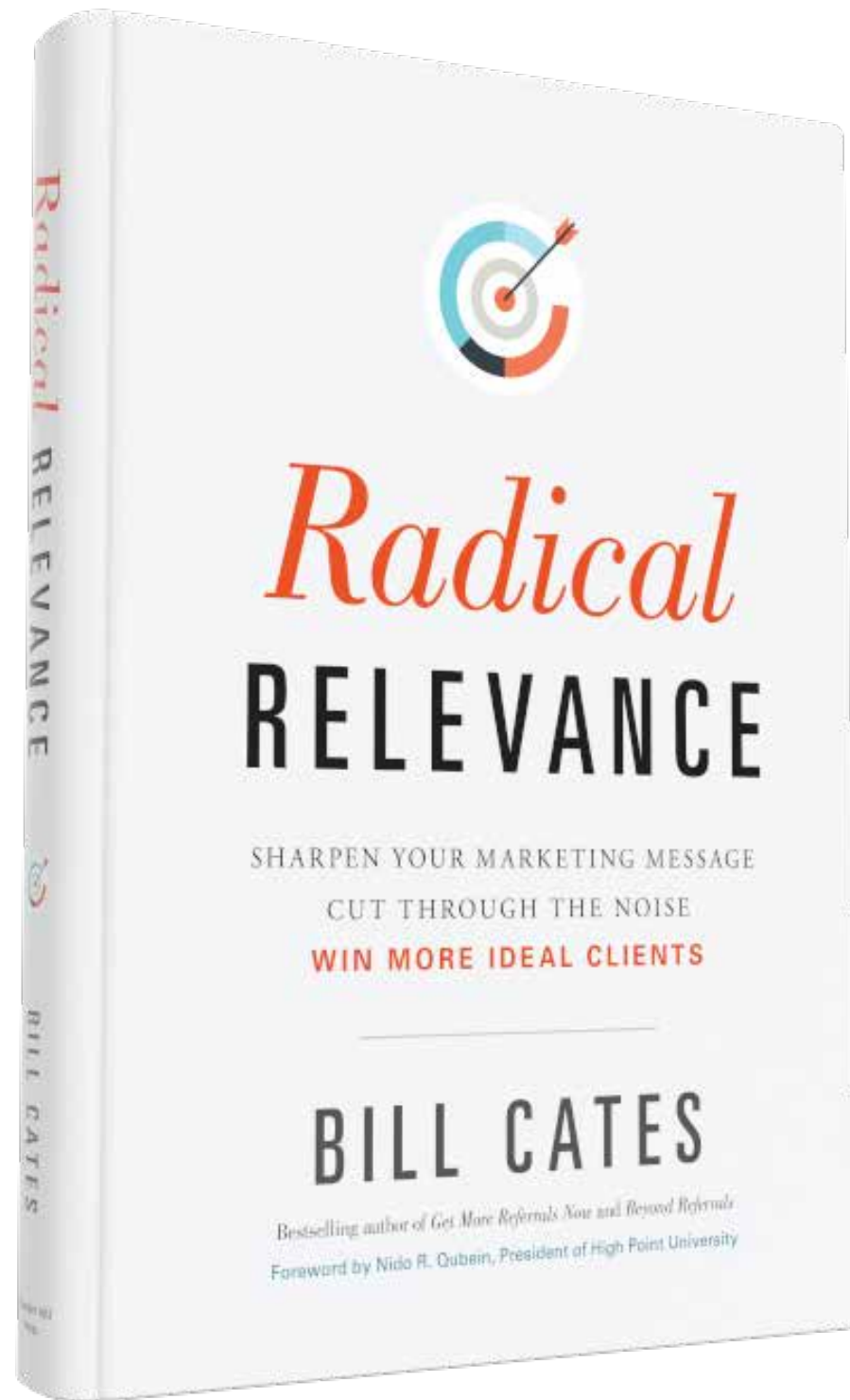
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Last Name	<input type="text"/>	
Email	<input type="text"/>	
Street Address	<input type="text"/>	
City	<input type="text"/>	
State	<input type="text"/>	
Postal Code	<input type="text"/>	
NAIFA Member # (if applicable)	<input type="text"/>	
Card number	<input type="text"/>	MM / YY CVC

Pay \$24.95



Virtual Book Signing + Q&A

Immediately Following This Session



CHAPTER 1

THE 17 RULES OF RADICAL RELEVANCE



www.BuyRadicalRelevance.com

RULE #1

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

RULE #13

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

A close-up photograph of a hand in a white shirt sleeve, pointing forward with the index finger. The background is dark and out of focus, showing another hand in a similar pose. The text 'strategic relevance' is overlaid in white on a dark blue horizontal band.

strategic
relevance

strategic relevance

You Are Crystal
Clear On Who Fits
Your Business

And Who Doesn't Fit?

- § Your Target Market
- § Your Right-Fit Client™
- § Your Differentiation



**YOUR
TARGET**





The Power of a Clear Target Market

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





The Power of a Clear Target Market

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





The Power of a Clear Target Market

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





The Power of a Clear Target Market

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





Todd McDonald
Financial Advisor
Albany, NY

“ 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. ”



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Helping optometrists plan life.
On purpose.



Our Process

Wealth management requires a multi-tiered 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.

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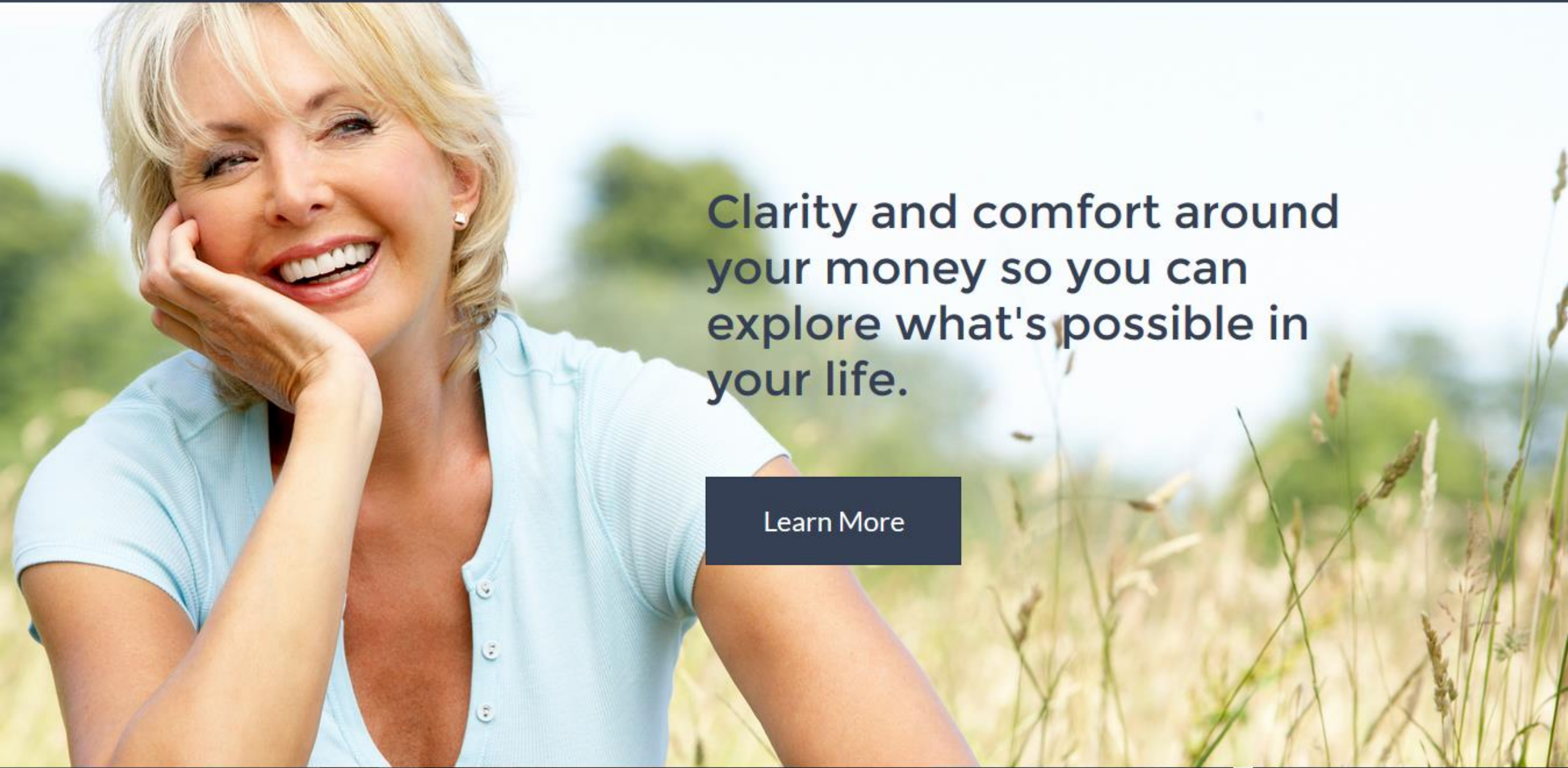
Sign Up

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



Adam Cmejla, CFP
Financial Advisor
Carmel, IN

“ 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. ”



**Clarity and comfort around
your money so you can
explore what's possible in
your life.**

[Learn More](#)

You've got money. Maybe a lot.

But you worry about making costly decisions, taking bad advice, or losing your financial independence.

I'm here to help you create and implement a simple, effective plan for your money giving you the comfort and clarity necessary to live an amazing life.

For as long as you live.

You're just 3 steps away from clarity and comfort . . .



**1. REQUEST
A CALL**

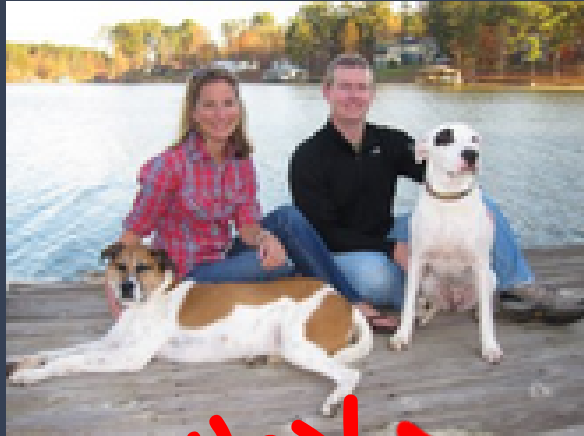


**2. DISCOVERY
SESSION**



**3. YOUR ACTION
PLAN**

Welcome to Wealthcare for Women!



I'm Russ Thornton, founder of Wealthcare For Women, and I've been a financial advisor for over 23 years.

As a young man in college, I watched my mother go through a divorce and struggle with her money & well-being. She really needed someone in her corner to help her gain the comfort & clarity necessary around her money to live a better life. That's why my practice helps women like her – and YOU – do just that.

You don't have to be worried and concerned about your money anymore. Let's start creating your amazing life.

His Why →

Request a call

[ABOUT](#)

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Erin Gay
Business Owner
Annapolis, MD

“ Working with Bill Cates, my entire team is now on the same page with how we view and communicate our value. The net result has been **more new clients who fit our profile.** ”



To Target or Not to Target?

That's the Question.

If you try to appeal
to everyone....



you may appeal
to no one!

Continuing Education Question #2



YOUR BULLSEYE



A close-up photograph of a hand with a finger pointing towards a missing puzzle piece in a blue puzzle. The puzzle pieces are interlocking and have a wavy, organic shape. The background is a solid blue color. The text is overlaid on the right side of the image.

WHAT IS A
RIGHT-FIT
CLIENT™

FOR?
YOU?

A close-up photograph of a hand placing a puzzle piece into a larger puzzle. The puzzle pieces are blue and have a white Apple logo cutout in the center. The hand is positioned at the top left, with fingers pointing towards the center. The background is a solid blue color.

FOCUS ON
RIGHT-FIT
CLIENTS™

Those you were
meant to serve
and who were
meant to be
served by you.

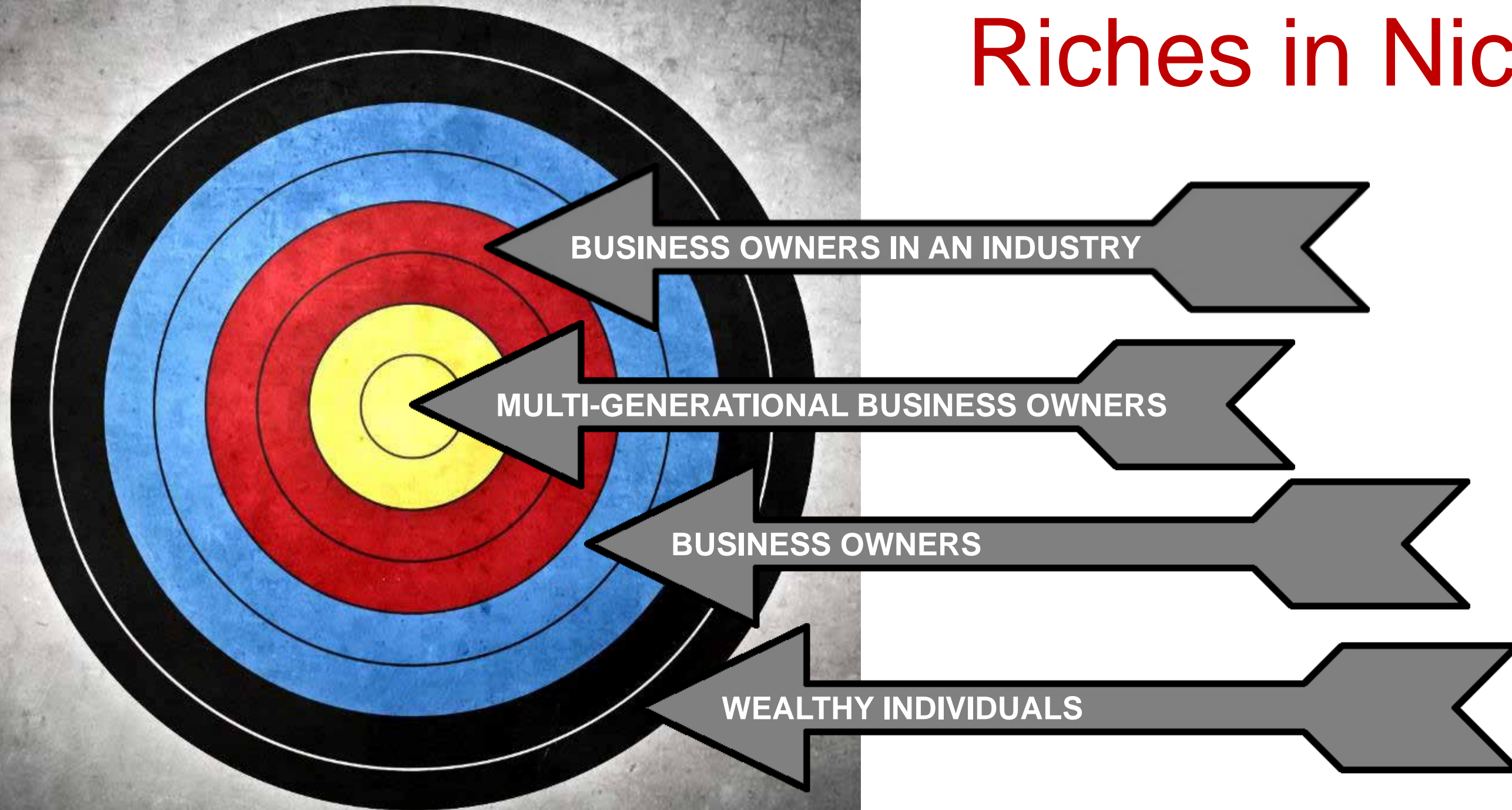
A close-up photograph of a hand placing a puzzle piece into a larger blue puzzle. The puzzle pieces are interlocking and have a wavy, organic shape. The hand is positioned on the left side of the frame, with fingers pointing towards the center. The background is a solid blue color, and the lighting is bright, creating a high-contrast scene.

FOCUS ON RIGHT-FIT CLIENTS™

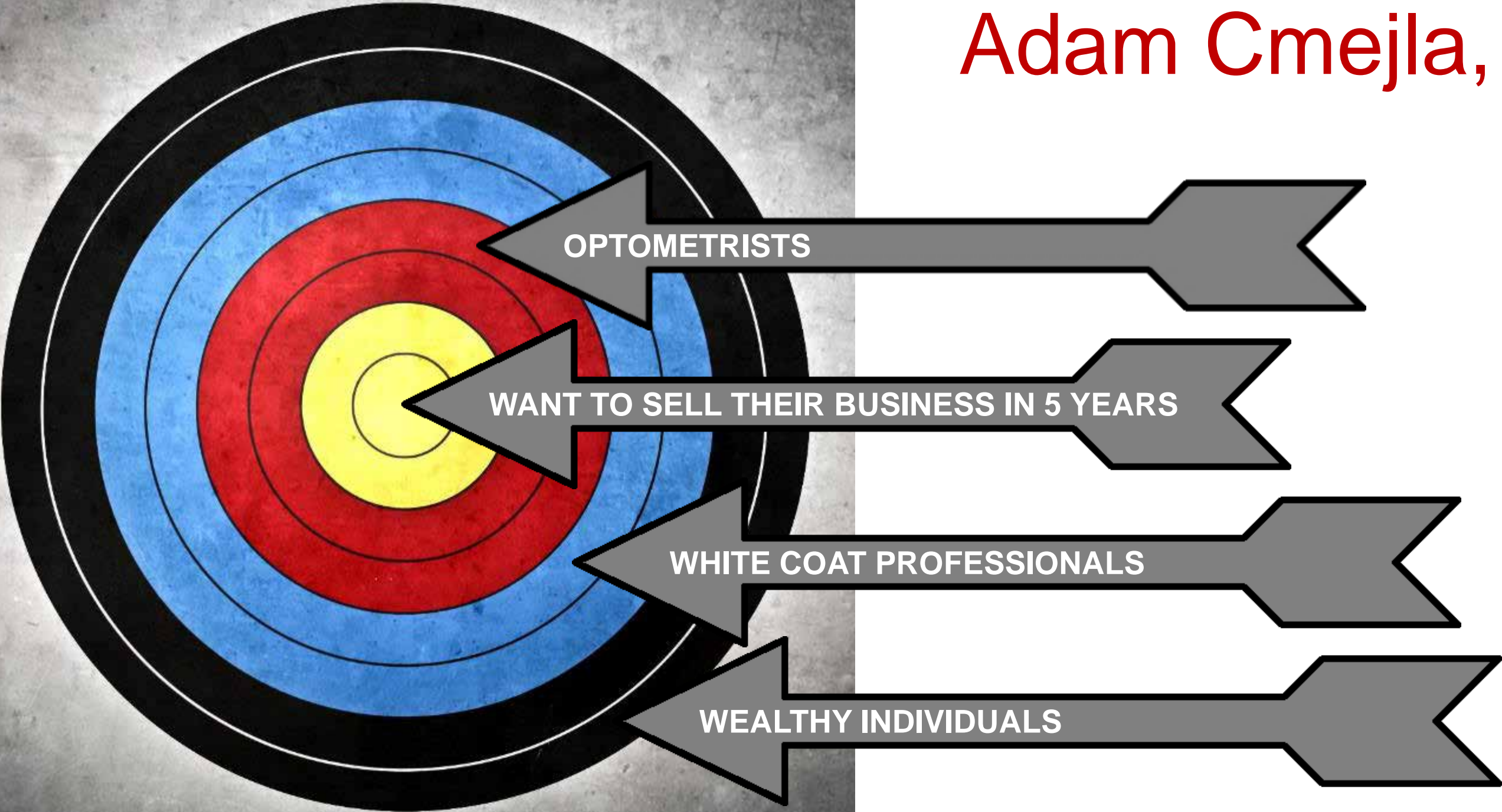
They resonate
with your value
immediately.

*Finally, someone
who gets me!*

Riches in Niches



Adam Cmejla, CFP

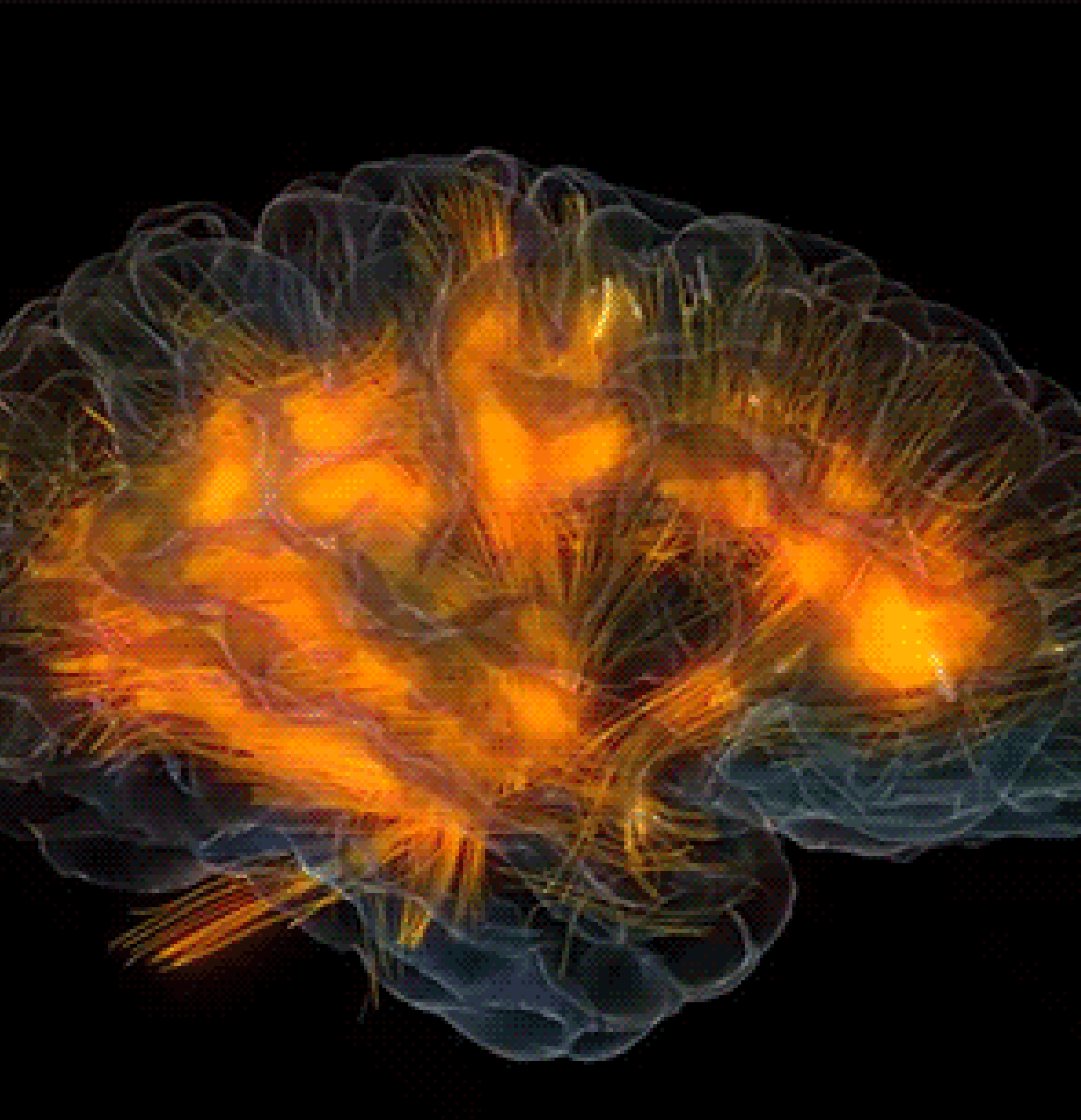


YOUR RIGHT FIT CLIENT

Demographics

- Age
- Gender
- Financials
- Location
- Occupation





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



YOUR RIGHT FIT CLIENT Psychographics

- Concerns
- Fears
- Challenges
- Opportunities
- Aspirations





Edward Entrepreneur

Medical Device
Research and
Manufacturer

COMPANY

- 20 years
- 180 employees
- 2 locations
- Sole Owner

Background

- Age 58
- Married / grown children
- College degree
- Sold 2 previous businesses

Behaviors

- Works long hours
- Current with technology
- Well-known & networked in his industry

Motivators

- Loves building businesses
- Loves growing his people
- Wants to do good in the world
- Wants to leave a legacy

Frustrations

- Would like more free time
- His money is working hard enough

How We Can Help

Personal CFO & financial quarterback



EMPOWERING OUR CLIENTS' FINANCIAL INDEPENDENCE

WHY WORK WITH US

LET'S MEET



OUR CLIENTS



THE BUSINESS OWNER

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THE PHYSICIAN

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THE RETIREE

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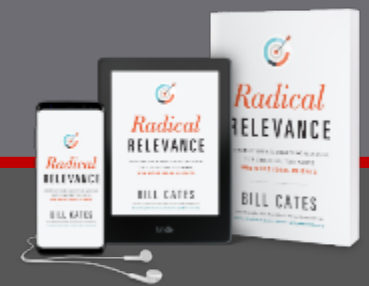
THE EXECUTIVE

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THE FAMILY

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THE BUSINESS OWNER



THE PHYSICIAN



THE RETIREE



THE EXECUTIVE



THE FAMILY

THE PHYSICIAN

We understand that you have a unique financial profile because of your delayed career start, high educational debt, and high earning potential. We're here to help you work through every challenge on the table so you can maximize your financial opportunities now and in the future.

WATCH VIDEO



Ruben and Monica Ramirez, Buena Vista Eye Care



Dr. Fadi Hanballi, Neurosurgeon
Dr. Rana Kronfol, Pediatrician



Dr. Ed & Chanel Assi, Center of the Heart





Healthcare Professionals

As an independent firm, we are committed to offering complete objectivity and unbiased advice.



Business Owners

We offer a full range of investment and financial services and have access to a wide array of solutions.

[Learn More](#)

A red laser beam originates from a bright white starburst on the left side of the image. The beam extends diagonally across the frame towards the bottom right. The background is a black and white checkerboard pattern.

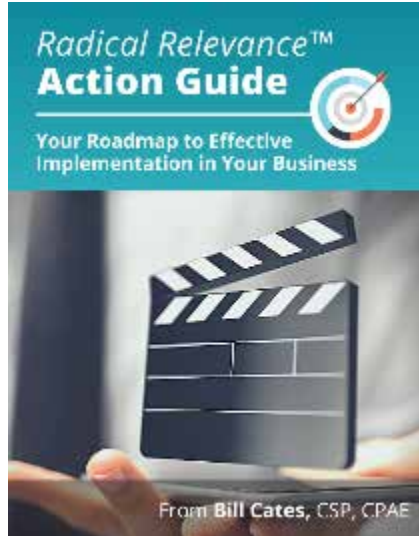
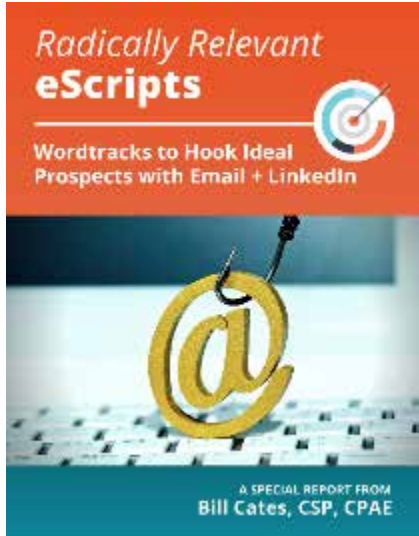
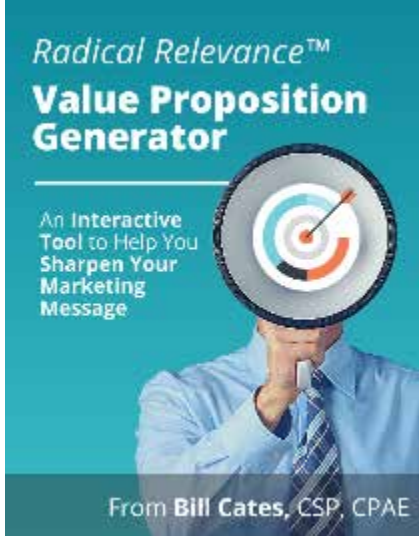
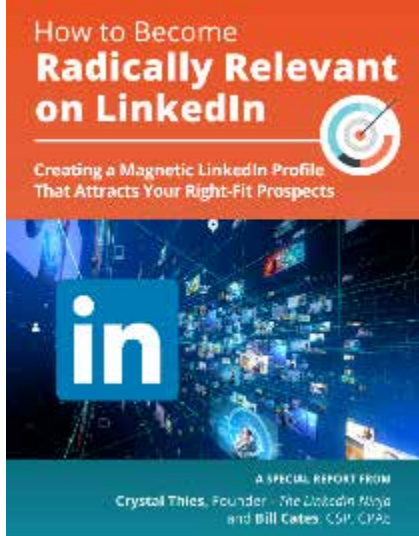
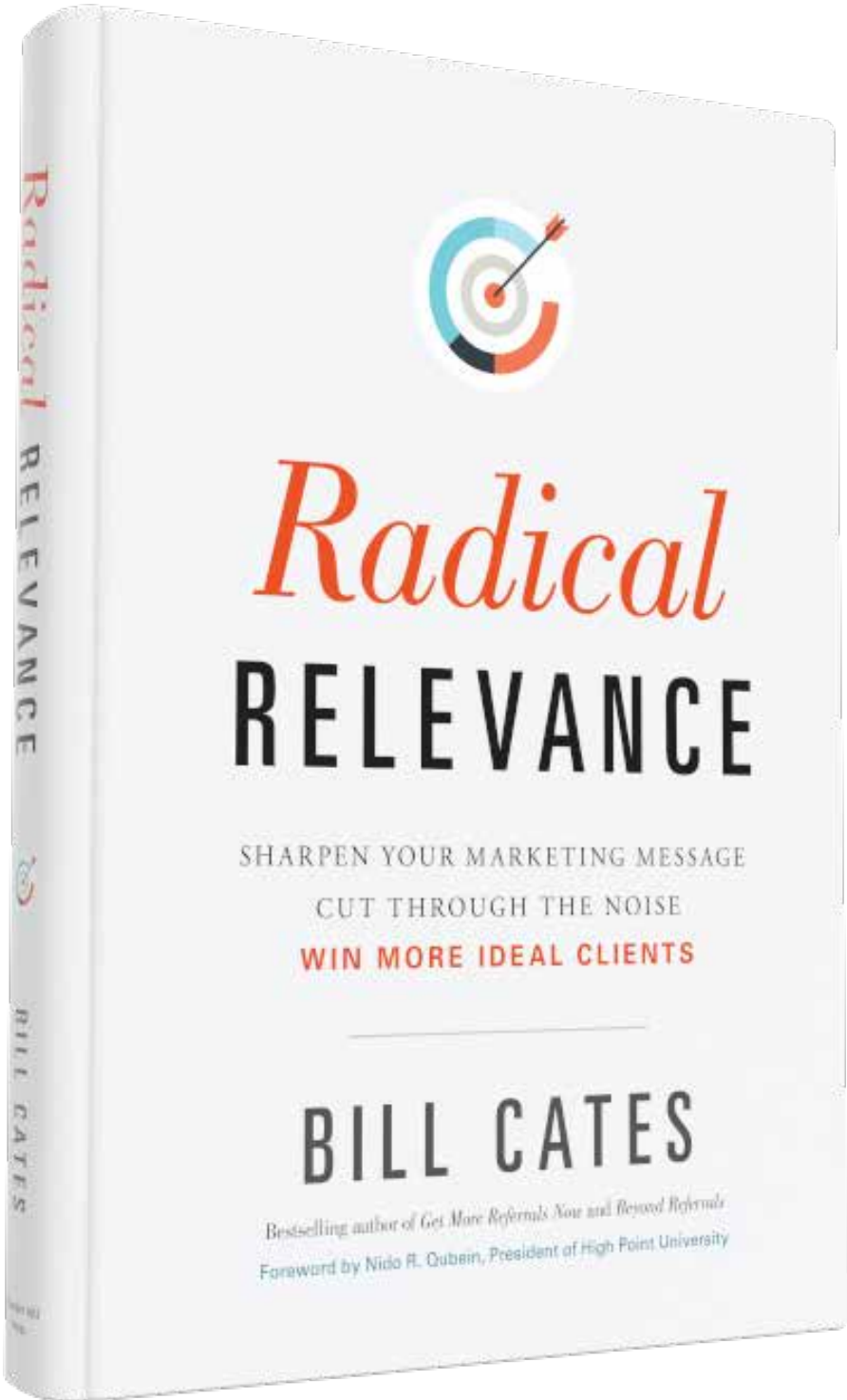
**THE MORE
PRECISE**

**THE MORE
POWERFUL**

Continuing Education Question #3

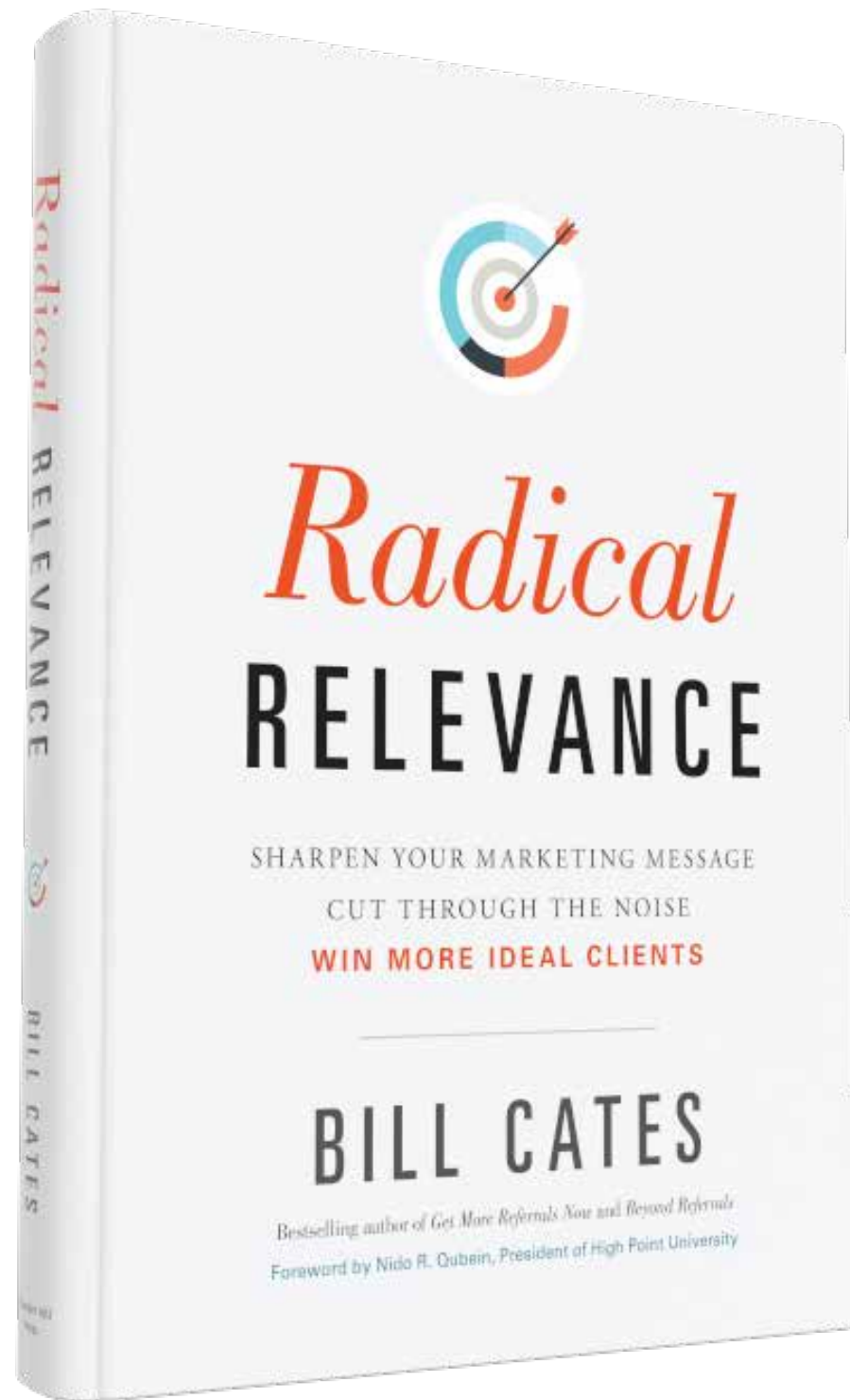


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Virtual Book Signing + Q&A

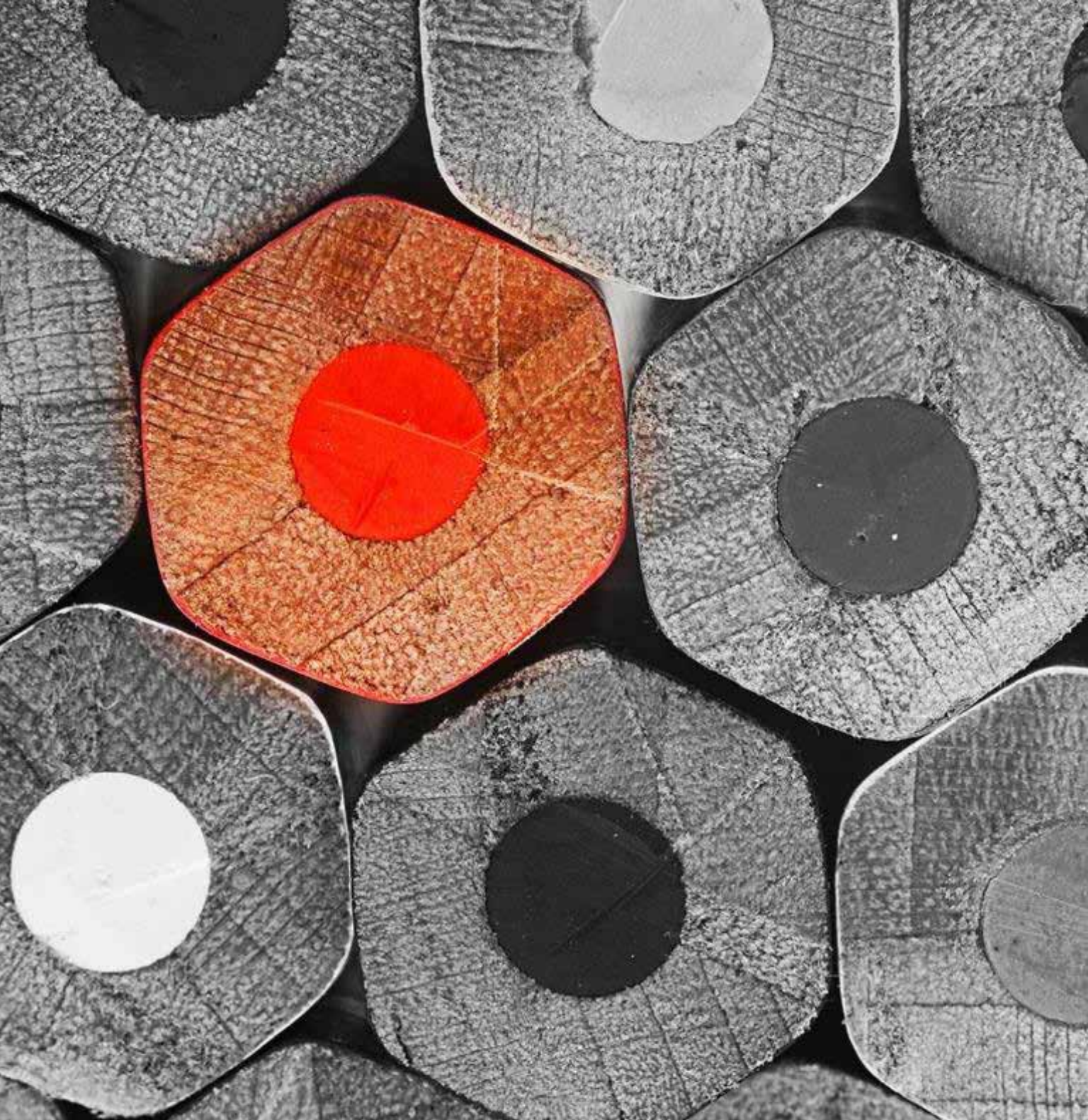
Immediately Following This Session



A person wearing a blue suit and tie is shown from the chest up, pointing their right index finger directly at the viewer. The background is dark and out of focus. The text 'tactical relevance' is overlaid in white on a dark blue horizontal band across the middle of the image.

tactical
relevance

What Makes **YOU** Different?



RULE #5

Only differences that matter,
matter.

Sources of Differentiation

1. Target Market
2. Special Expertise
3. Special Process for Uncovering Gaps or Problems
4. Process for to Continually Add Value



A Formula to Try Out

Anyone can _____.

But only we _____.

For example, _____.



Hypothetical Example #1

Many financial professionals can talk to you about various financial tools and products. That's not hard to find.

But very few specialize in working with business owners in companies of your size. This expertise allows me to serve as your financial quarterback, assembling a team of specialists to handle all of your financial needs.

For example, one of my clients – an owner of a company similar in size to yours – told me the other day that he appreciates that he is now freed up to do what he does best – running his business and making money.



Hypothetical Example #2

Many financial professionals can talk to you about various financial tools and products. That's not hard to find.

But very few have the depth of knowledge that I do about your company's benefits package. By focusing on your firm. I'm able to anticipate challenges and opportunities that others simply can't – resulting in a better course of action.

For example, one of my clients – an executive at your level in another department – told me that he thought that I know more about your benefits package than your HR department.

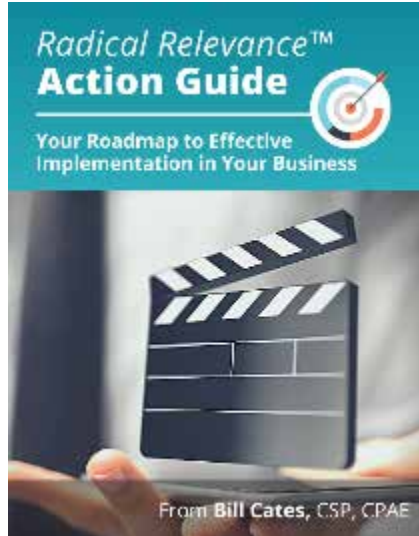
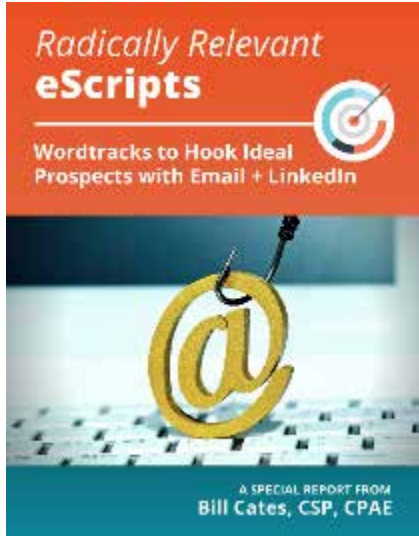
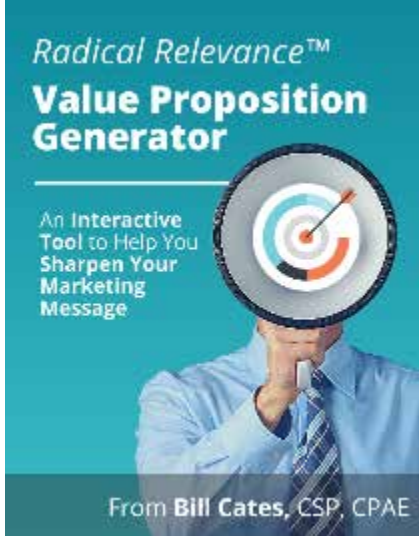
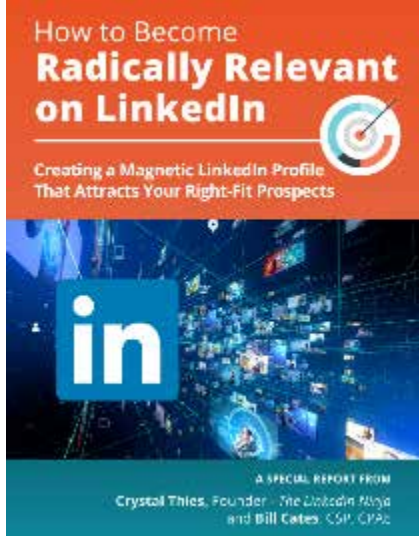
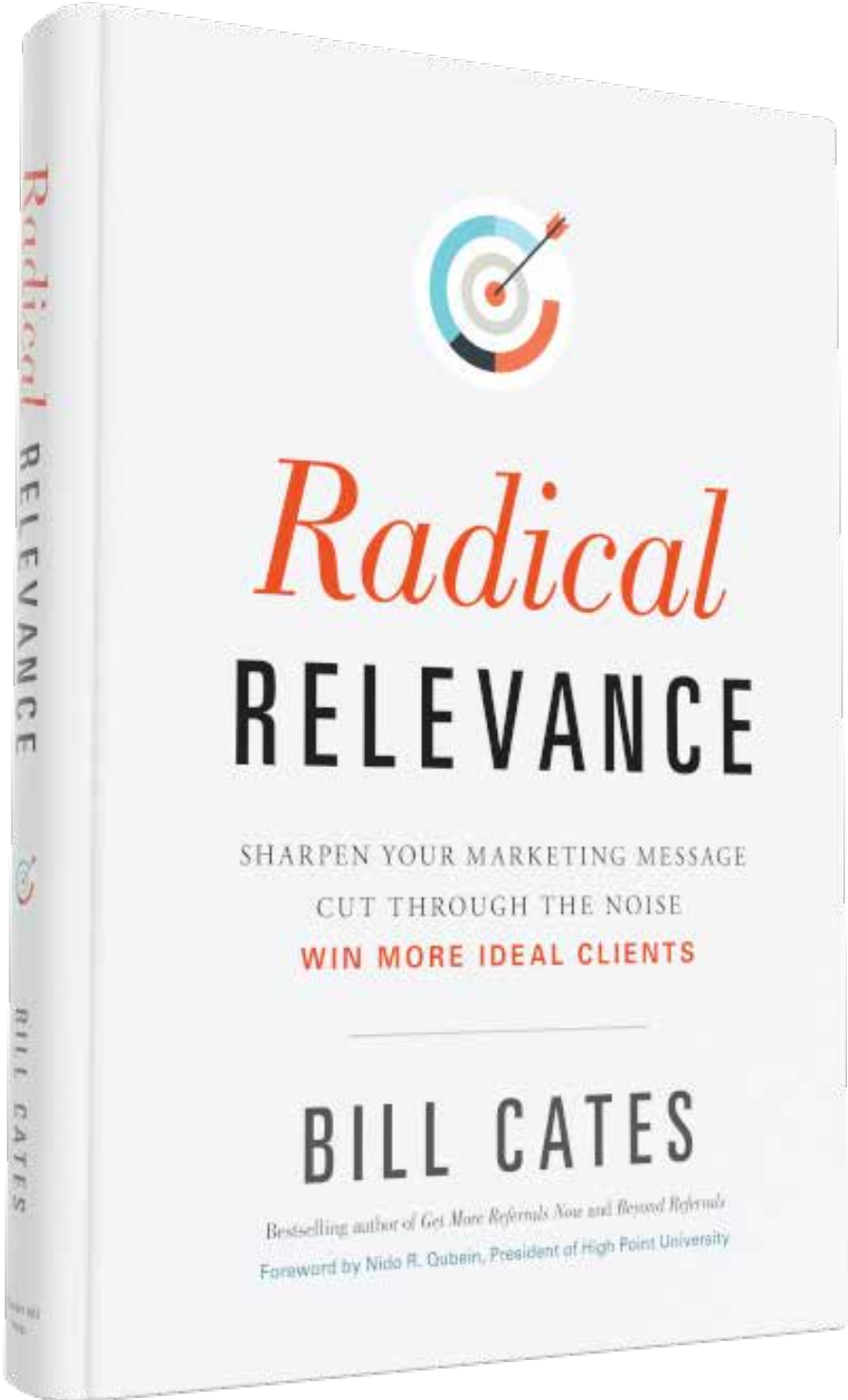


Talking About Your Differentiation

People care about your
differentiation only
if it's *relevant* (useful)
to them.



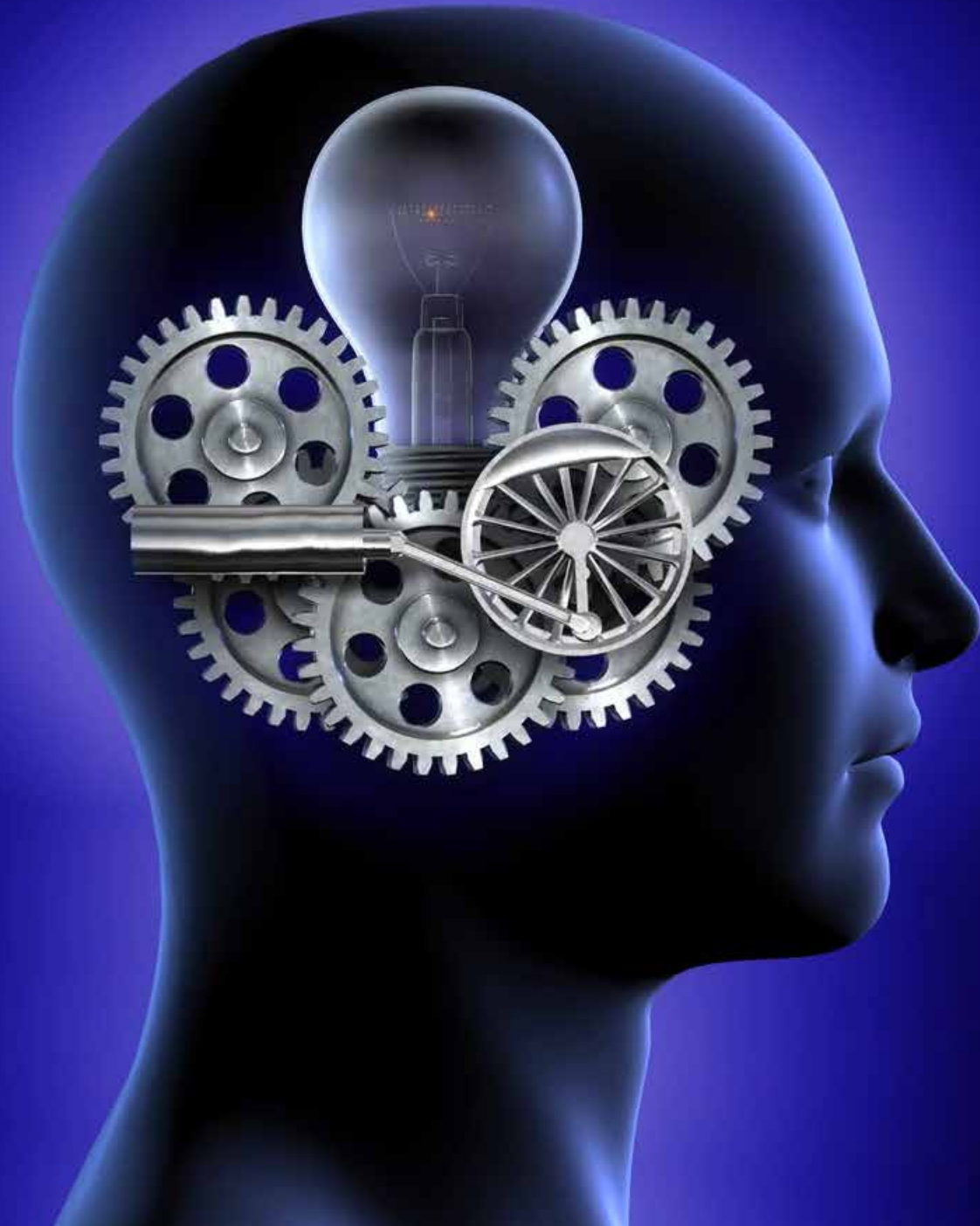
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Knowledge is

Worthless



Success Takes




Action





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