

# Radical Relevance with Bill Cates, CSP, CPAE

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## PROGRAM OUTLINE

**Introductory Story – Clients Suffer from Message Overload** 10 minutes

**What Are You Trying to Accomplish with Your Messaging?**

- You are not the hero. Your clients is the hero and you are the guide. 10 minutes

**Introducing the 17 Rules of Relevance** 10 minutes

- Give your clients a seat at the table. Collaborate for best messaging.
- Use more personal messaging. Go from *we* and *our* to *you*, *your*, and *you're*.

**Bring More Value to Your Clients by Narrowing Your Niche Market** 15 minutes

- Your knowledge of their context (business, occupation, stage in life)
- Your special expertise, training, or certifications
- Your process for uncovering and solving client problems and opportunities
- Your plan for continuing to bring value to your clients over time

**How to Narrow Your Focus Further to Serve Your Right-Fit Clients™** 15 minutes

- Get clear on the demographics
- Get clear on the psychographics
- Develop specific personas of who you serve the best

**Discovering and Communicating Your Points of Distinction** 10 minutes

- Help your clients discover if you are the right fit for them
- Create a differentiation gap between you and other advisors, w/o being negative

**Developing and Communicating Your Value Proposition** 15 minutes

- Your area(s) of expertise
- Who you serve the best
- How they benefit from your processes
- Examples / Case Studies (compliance approved)

**Help Your Clients Make Decisions That Are in Their Best Interest** 15 minutes

- Clarity in their current situation
- Clarity about their future
- Clarity about their challenges
- Clarity about their opportunities
- Understanding the Concept of Loss Aversion