

8 SIMPLE STEPS

To Reach **Exponential Growth**
By Multiplying Your Best Clients

A proven process to **clarify your message** and
build a **thriving referral-based business**
*with less friction, frustration, and
wasted time*



A Special Report By:
Bill Cates, CSP, CPAE



You can be
relevant, or
you can be
ignored.

BILL CATES

WE HAVE A PROBLEM.

You and I live in a world of marketing message overload. It's been estimated that the average person is exposed to **3,000 marketing messages per day!** In order to keep our heads from exploding, our brains are equipped to automatically - and subconsciously - filter the information presented to us, so that only the most relevant messages register on our radar. To put it simply, ***if it's not immediately relevant, it will be ignored.***

So, it's no wonder we often feel like we're "**spinning our wheels**" when **trying to reach prospects these days.** To compensate, most professionals are **working harder than ever** to try to cut through the noise in the marketplace -- calls, texts, e-mails, LinkedIn messages, Facebook ads, search engine optimization... the list is endless.

And it's not working.

Most people are **exhausted, frustrated, and not nearly as successful as they know they should be**, considering how hard they are working.

The good news? There is a better way.

I've been where you are. **I am not a natural-born salesperson.** Cold calling has always made me uncomfortable, and I'm not a fan of the "hard sell." **I lacked confidence** in myself and my process, and was **tired of having to chase the money.**

However, I've discovered that there *is* a better way. **Over the past 25 years, I've developed a tried-and-true process for building a thriving referral-based business.** This process helped me build and sell two successful businesses, as well as help thousands of other professionals and companies **achieve exponential growth** by following my system.

In that time, I have discovered one **powerful, yet simple, key to success...**

Radical Relevance!



I like to think of Radical Relevance as the business equivalent of love at first sight.

It's that moment in the movies when the main character is standing in a crowded room and in walks their soulmate. Eyes lock, all the noise in the room fades away ... and they just know it was meant to be.

Or, in less romantic terms, *it's an instant connection with a prospect that you are meant to serve.*

The key to Radical Relevance is crafting a marketing message that cuts through all the noise in the marketplace, instantly resonates with our ideal prospects, and moves them to action.

But, first... how do we even find these people? Most of us are tired of "kissing frogs." **We need a reliable process for identifying and acquiring clients** who are a perfect fit for our business (or, as I like to call them, "Right-Fit Clients.")

THE QUICKEST PATH TO RELEVANCE

The fastest, easiest, and most effective way to become instantly relevant in the eyes of a prospect is to be introduced by someone they already respect and trust.

In the coming pages, I am going to lay out my **proven 8-step process** for building a thriving business built on referrals, personal introductions, and communicating relevant and compelling value.

This process has worked for me, it has worked for thousands of other professionals, and it will work for you, too. So, if you're ready to **revolutionize your client acquisition process** and take the first step toward **exponential growth** ...

Let's get started.





1 DEFINE YOUR TARGET MARKET

You've undoubtedly heard the saying "if you try to be good at everything, you'll risk being great at nothing."

In theory, most people understand the benefits of narrowing their marketing focus and not trying to be everything to everyone. But, *in reality*, those same people are often afraid to fully commit to a niche market out of fear of missing out on other opportunities.

The truth is, you *will* forego some opportunity by intentionally focusing on a specific target market (or two, or three). But, if done correctly, your success in your niche market(s) will more than compensate for any missed opportunities.

So, the first step in becoming Radically Relevant is determining who you *actually* want to be relevant to.

The more targeted your market, the more relevant your messaging will naturally become. If you have more than one target market, your messaging needs to be geared specifically for each, or it will end up becoming watered down and ineffective.

8 Massive Benefits of Narrowing Your Target Market

1. **Easier to identify your prospects.** In this digital age, finding lists of targeted prospects has become relatively easy.
2. **You will bring more value.** You have more insight into their challenges and opportunities than a generalist.
3. **You deliver a more relevant marketing message.** The narrower your focus, the more exacting your messaging – on your website, LinkedIn profile, emails to prospects, etc.
4. **You become referable faster.** Since you've developed processes geared to your target market, you can create better results faster. You exceed expectations.
5. **Referrals and Introductions are easier to create.** Your clients know people like themselves, and introducing you to others validates their decision to work with you.
6. **You'll leverage others targeting the same market.** You can create powerful reciprocal referral relationships with these strategic alliances.
7. **You'll create a reputation for yourself.** Creating visibility is much easier when you go from a scattered approach to a well-defined target.
8. **Your business will be more profitable.** By combining the power of a great reputation with bringing more real value to prospects and clients, you can often charge more and/or work more efficiently.



2

ZERO-IN ON YOUR BULLSEYE

Now that we've established the importance of defining your target market, let's take things one step further.

Simply defining your general target market isn't enough if you want to become Radically Relevant and achieve exponential growth in your business.

You need to define *exactly* who your Right-Fit Client™ is.

A Right-Fit Client is one that is perfect for you, because you are perfect for them. Your message will resonate immediately with Right-Fit prospects.

In shooting sports, the bullseye almost always wins you the most points. In business, hitting the bullseye almost always wins you the most profitable revenue.

Bottom line? The bullseye is your Right-Fit Client. If you don't know where your bullseye is, you're "shooting blind."

The best way to drive home this concept is with an example I heard from the brilliant Phil M. Jones in his Audible Original, *How to Persuade and Get Paid*.

Jones asks us to imagine what we would do if we were in a shopping mall and lost track of our child.

While I certainly don't want to trivialize the terrifying circumstance of a missing child, the critical nature of this scenario works to emphasize the importance of getting your bullseye right.

Says Jones, "Knowing you must find the child, how well would you describe them to a stranger to increase your chances of finding them? You'd give them everything, wouldn't you? Hair color. Eye color. Height. What they were wearing. You might reach for a picture you were holding on to. . . . You know that the better the description, the more likely people will be able to help you find your child."

Jones explains that you'd share that picture with people who have "leverage"—security and anyone else who could influence your ability to find your child. This is what we do with missing people.

This applies to "missing clients," too. If you would like to find more ideal clients, the first thing you have to do is decide *exactly* who they are. Now, you may not need to get as specific as eye color and weight, but you get the idea. You need to know exactly who you are looking for if you want to find them.

Attracting Right-Fit Clients™

The more you communicate your value proposition based on your crystal-clear vision of the Right-Fit prospects you want to attract, the more effective your message will be. The increased empathy and resonance will lead to more interest on their part. They will think, "This guy (or gal) gets me."

A clear target and a focused bullseye gives you the insight you need to craft a message that will hit the bullseye in their brain. You'll grab their attention and immediately pull them into your story of value.

Action Steps

Complete your Right-Fit Client™ Profile (see below) to get a clear, detailed picture of what an ideal prospect looks like for you and your business. Don't waste your time on prospects that won't make ideal clients.

FREE DOWNLOAD: Right-Fit Client™ Profile

While every business and situation has its own unique attributes, here is a checklist you can use to begin to identify the characteristics of *your* Right-Fit Clients™.

To access your complimentary copy of the PDF, visit:

www.RightFitClients.com.





3

CREATE DIFFERENTIATION THAT MATTERS

Many businesses struggle to understand and articulate what makes them different. But let's be clear about one thing: Your prospects don't care about what makes you different unless they understand *exactly* how that difference benefits *them*.

I see so many professionals building their website around a hobby or a special interest such as fishing, hunting, horseback riding – their favorite color, whatever. And look, that's okay. There's nothing wrong with creating that personal connection.

But, while superficial differences might attract attention, if there isn't an obvious, tangible value associated with that difference, your differentiation will not accomplish your goal of acquiring more Right-Fit Clients.

At the very least, you should attempt to learn a few things about your prospect's world and tailor how you communicate your value based on that information. This includes determining which differentiators to focus on.

Then, whenever you talk about what gives you an edge over your competition, tie it back to a *direct* benefit to your prospect.

Your Sources of Differentiation

If a prospect or center of influence asks you, “What makes you different?” do you have an immediate, succinct, and confident answer?

Here are four broad categories to help you discover some of your points of distinction in a manner that provides real value:

1. Expertise or Specialization

People like to work with experts and specialists. Expertise can come from formal education, certifications, and years of experience. Don't be timid about emphasizing your expertise or specialization.

2. Target Market

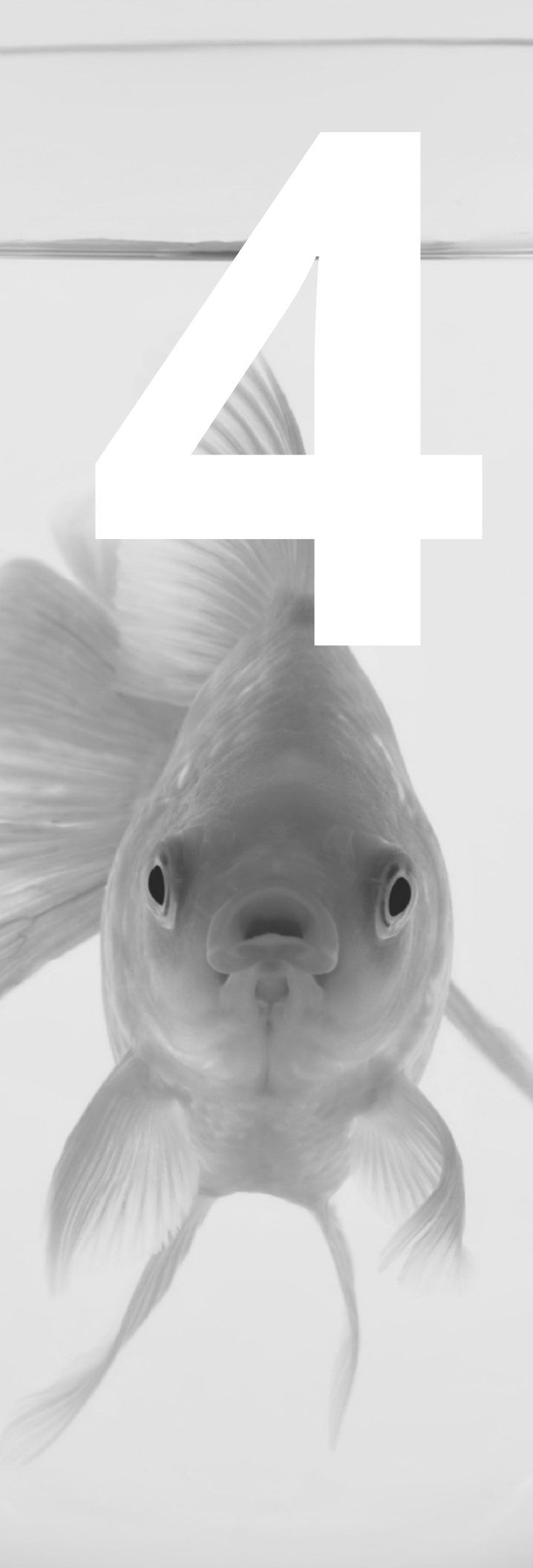
Focusing on a target market brings more perceived and real value. Your value is recognized immediately because of the questions and things you teach. You demonstrate empathy for their challenges and opportunities, bringing solutions that a generalist can't.

3. Process for Discovering and Revealing Problems and Opportunities

Employing a comprehensive approach to discussing your prospects' and clients' problems can be a great source of value. Now you can bring a customized approach to their problems and opportunities.

4. Process for Adding Continual Value to Clients

One of your points of differentiation may stem from how you continually bring value to your clients. Communicating your client service promise to prospects can often be the tipping point that turns that person into a client.



4

FOCUS YOUR MESSAGING

Neuroscientists tell us that you have 2.7 seconds to catch someone's attention with your marketing message.

And, these same scientists tell us that in today's overstimulated world, most humans have the attention span of a goldfish – or about 8 seconds.

No matter how much value you bring to your prospects and clients, if you don't deliver a message that instantly grabs your prospect's attention, shakes them up a little, and keeps them interested, you'll probably never reach the level of success that you know is possible for you.

But, when you combine a radically relevant value proposition with the power of meeting prospects through referrals and introductions, you'll be unstoppable.

Now that you're crystal clear on exactly *who* your Right-Fit Client is, and exactly *why* you are uniquely qualified to serve them, you're ready to start crafting your marketing message.

Create Your Radically Relevant Value Proposition

In order to deliver a relevant message that's guaranteed to grab your prospect's interest, you must first research that individual and/or their company.

In fact, you should never, ever, ever contact a prospect without doing at least some basic research. After all, how can you deliver a relevant message if you don't have much context about who you're contacting?

There are two primary research categories you can tap into before contacting your new prospect. Both have value.

Cold Research

With cold research, you're not talking to people to get information. You're mostly using online research to learn about both the prospect and, if applicable, the prospect's business.

Cold research includes, but is not limited to:

1. Reviewing the company website and their profile if it's available.
2. Reviewing the prospect's LinkedIn page.
3. Googling them. You can often find articles and press releases written by, or about, your prospect.

Warm Research

Warm research helps you gather information that you aren't likely to find with cold research. It involves finding out what you can from people who personally know your prospect, especially your referral source. *Warm research is one of the key reasons why a personal introduction is the fastest and most direct route to Radical Relevance.*

Here are some questions to ask your referral source prior to making contact with the prospect:

1. What's going on in the prospect's life (and/or business, career, etc.) that's most important to them right now?

If you can position the introduction (and your follow-up) to them in a way that ties the work you do to what's top of mind for them, you now have a radically relevant approach. You will at least gain their attention.

2. Can you give me a sense of their personality?

This will help determine how you might adjust your communication style to be more in line with theirs. Are you dealing with someone who's bottom line-focused or open and chatty? Can you bring some humor to your approach?

3. How do you think they'll react to this introduction?

Do your referral source and this person regularly exchange resources and make introductions? Is the prospect typically open or resistant to new ideas?

Doing both cold and warm research will not only give you more confidence when approaching new people, it will also help you to generate more meaningful and relevant conversations. Use the information you gather to **craft a message that communicates your value to the prospect ... on their terms**

FREE DOWNLOAD: "Value Proposition Generator" Tool

In the next two pages, I'm going to tell you why you absolutely need to get a copy of my new book, *Radical Relevance*, if you haven't already done so. High on that list is that you will get **FREE access** to the Radical Relevance Toolkit™, which includes my "Value Proposition Generator."

Download this interactive tool to craft your own Radically Relevant value proposition based on the step-by-step process that I outline in the book.

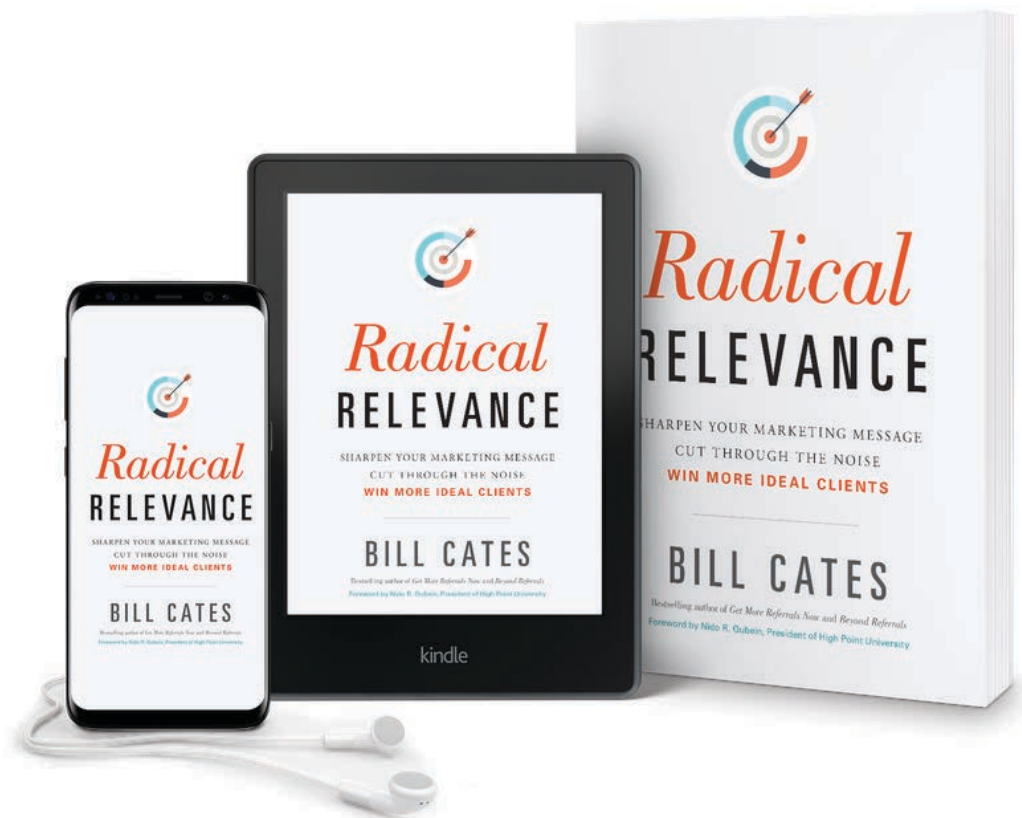
Visit www.CatesToolkitPreview.com to learn more.

ACTION STEPS

Have you gotten your copy of my new book, *Radical Relevance*, yet? If not, it is the key to mastering the first four steps of my process.

Radical Relevance is your **roadmap to winning more Right-Fit Clients™** in a crowded and noisy marketplace. You will learn tangible strategies and tactics for:

- ✓ Crafting an irresistible message that grabs attention.
- ✓ Reaching more prospects who truly fit your business.
- ✓ Moving them to action, so they follow your recommendations.
- ✓ Acquiring more Right-Fit Clients™.
- ✓ Building a more profitable, fulfilling, and enjoyable business.



Buy your copy to get started today!



FREE BONUS!

Radical Relevance Toolkit™

Inside your copy of *Radical Relevance**, you will find instructions for registering to get FREE access to the Radical Relevance Toolkit™ - an online library full of exclusive, results-producing resources that will help you hit the ground running on steps #1-4, including:

- **How to Create Your Right-Fit Client™ Personas**

An interactive worksheet designed to help you identify the key characteristics that make up your Ideal Client Profile.

- **Value Proposition Generator**

An interactive tool that walks you my step-by-step process for crafting a *Radically Relevant* value proposition that instantly resonates with your Right-Fit prospects, and moves them to action.

- **How to Build a Radically Relevant LinkedIn Profile**

In this eGuide, Bill partners with LinkedIn guru Crystal Thies (founder of The LinkedIn Ninja), to teach you how to create a magnetic LinkedIn profile that will help you connect with more Right-Fit Prospects.

Plus...

- **Radical Relevance Action Guide**
- **Scripts** for prospecting via email & LinkedIn
- Value Gap **Assessment**
- Radically Relevant **Website Guide**

... and much more!

Buy your copy to get started today!



** Access instructions are in the beginning of the book, right before the foreword*



The most
direct **path to**
relevance is
through a warm
introduction
from a trusted
source.

BILL CATES

5



BECOME SUPER-REFERRABLE

I've never met someone who told me they didn't like getting referrals. I imagine if I did, they'd also tell me they don't like puppies, babies, or making money.

Everyone loves getting referrals! Why? Because, as we've already established, *a warm introduction from a trusted connection is the single best way to create instant relevance with a prospect.* Since we know that relevance is the key to converting prospects into clients, working from referrals and introductions just makes the whole client acquisition process easier, and more comfortable, for everyone involved.

The problem is, while almost everyone loves getting referrals, most aren't getting as many as they'd like, or think they deserve. I cannot tell you how often I've heard *"I don't understand why I'm not getting more referrals. My clients love me!"*

So, what *does* it take to get more unsolicited referrals?

Well, since you asked...

The Key to Referrals without Asking

You may be surprised to find out that when it comes to generating referrals and introductions, your goal is not a satisfied client. In fact, research shows that there is actually a very low correlation between client satisfaction and the giving of referrals.

Who does give referrals? Engaged clients!

An engaged client appreciates the value you bring – through your value (your processes, the questions you ask, the things you teach, your wisdom, and your responsive service.

An engaged client also appreciates who you are as a person -- your life experiences, your values, your sense of humor, and your perspectives. The bottom line is, they *like* you!

An engaged client will create introductions for two reasons:

1. They want to share your value with others.
2. They want to help you.

Action Steps

If you want to become super-referable so that you start getting more unsolicited referrals, the key is maximizing client engagement throughout all 3 phases of the client journey. What can you do to add more *value* and more of *you* throughout the 3 phases?

1. The Prospect Experience (Leading with Value)
2. The New Client Experience (Your Onboarding Process)
3. The Ongoing Client Experience (Your Client-Service Promise)

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GET COMFORTABLE ASKING FOR REFERRALS

By now, I think we can agree that referrals are awesome. And there's nothing better than having a perfect prospect call us, ready to meet with us, because their friend told them that they should.

While highly-relevant messaging and engaged clients are foundational to your success (and will certainly create incremental growth), you will never achieve the level of success you aspire to until you start leveraging your hard-earned relationships.

In other words, you need to get comfortable asking for referrals and proactively pursuing introductions to ideal prospects.

Getting comfortable being proactive means getting confident. Turn the page to start boosting your confidence.

Multiply Your Best Clients

By implementing the client-centered, value-based approach that I've been teaching for over 25 years, you will become confident in asking for introductions and will generate a predictable flow of new business.

Action Steps

1. Learn the process that's proven to produce results (without pushing or begging!) Click the video link below or visit: www.VIPSmethod.com.
2. Take to heart the "S" part of our method. Come prepared with folks you know your clients know or at least some categories of people.
3. Find a "Referral Buddy" and practice, practice, and practice. Then hold each other accountable and celebrate your successes.
4. Make your "love list." These are clients who "love you" and/or who have already provided you with referrals. Most of them we'll be happy to help you help others.



The CATES ACADEMY

For Relationship Marketing

Video  Based Training System

Learn a Proven Process to Attract More of the *Right* Clients.



Stop wasting your time chasing after prospects who don't fit your business! The Cates Academy™ is a comprehensive online video-training program that will help you get in front of more ideal prospects, so you can spend less time on client acquisition, and more time *enjoying* the thriving business you've built.

Discover how to build a perpetual flow of Right-Fit Clients™ by mastering these 3 core strategies:

- Delivering More Effective Messaging
- Maximizing Client Engagement for Unsolicited Referrals
- Creating Advocates for your Business to Unleash Exponential Growth

*"After learning Cates' system, my **business grew 60% over the previous year.** I'm now spending less time chasing after prospects who don't want to hear from me, and **more time doing the work I love to do.**"*

Mike Barratt, Financial Advisor | Des Moines, IA

Your Membership in The Cates Academy™ includes a full year of access to:

- | | |
|---|--|
| ☒ 5 Core Courses (18 Videos) | ☒ Scripts, Scripts.. and More Scripts! |
| ☒ 60-Day Action Plan | ☒ Built-in Reinforcement Resources |
| ☒ 1:1 Online Coaching with Bill | ☒ BONUS: Rapid Fire Referrals (\$197 Value) |

Learn More and Enroll
www.TheCatesAcademy.com



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START TURNING REFERRALS INTO INTRODUCTIONS

Referrals are worthless.

I know what you're thinking. "Wait, what!? I thought we've just spent all this time talking about why they are awesome?"

Let me explain.

There was a time when we could get a name and phone number, call that person up ... and actually reach them! But those days are behind us. As a result of Do Not Call regulations, marketing-message overload, and all the other barriers to making a personal connection with a prospect, it is nearly impossible to reach people these days.

Let's face it... it's hard enough to catch up with our clients, much less to get on the radar of someone who has never heard of us! If we want to reach a prospect, a referral alone is simply not enough.

We have to get connected.

We have to get personally introduced.

Action Steps

I have seen so many people be great at *getting* referrals, but struggle to convert referrals into introductions. While I teach a variety of specific strategies for turning referrals into introductions - including specific scripts and ways to utilize LinkedIn, e-mail and even text messaging - there are 3 basic steps you want to follow:

1. Learn as much as you possibly can about the prospect. Your referral source is usually your best place to start in gathering this information.

2. Craft a relevant and compelling reason why he or she should speak with you. One of the most effective ways I have found to create this reason is by asking your referral source this question: "What's the most important thing going on in their life right now?" If you can link the work that you do with what is most important to them (hint: RELEVANCE!), you have a much better chance of turning the referral into an introduction, setting an appointment, and gaining a new client.

3. Treat the introduction as a collaborative process between you and the referral source. Discuss the best method of introduction. You want it to feel comfortable for all parties while sparking the attention of the new prospect. In-person introductions are usually best, but often take time to arrange. When executed properly, email introductions can also be effective.

Hire Bill Cates to Speak

Speakers Hall of Fame® | Sales Thought Leader | Relationship Marketing Expert

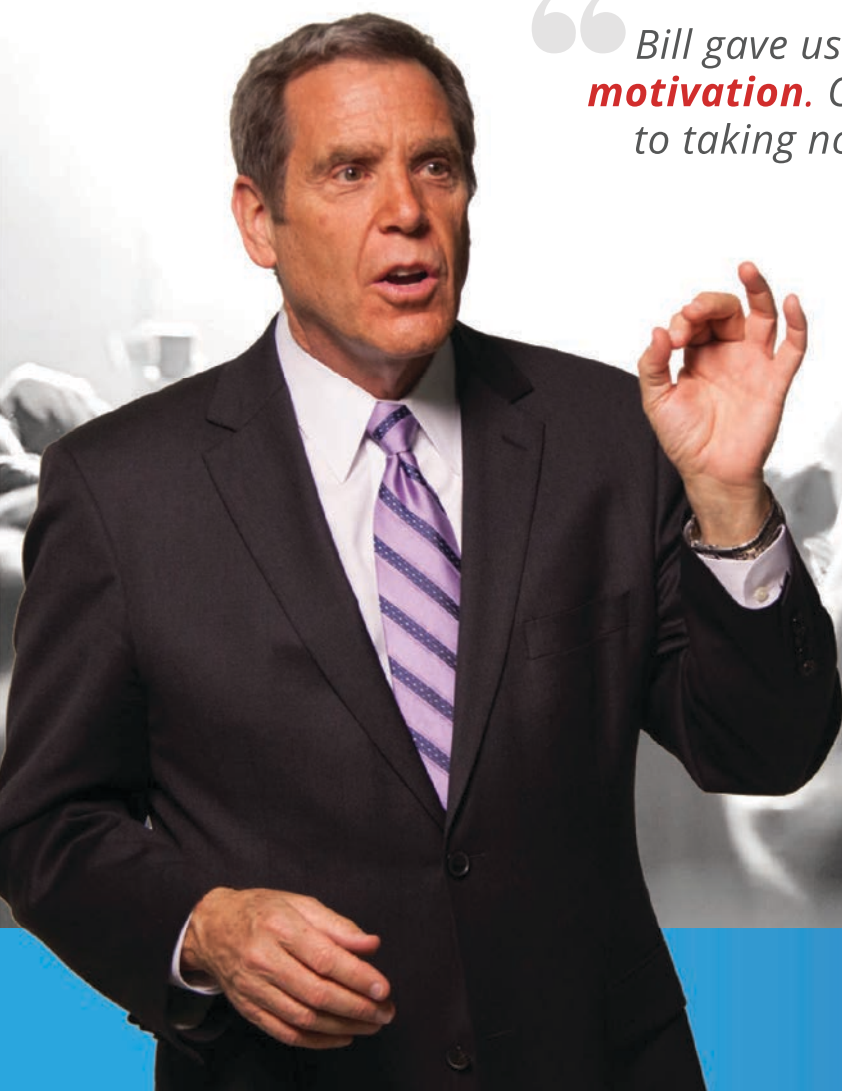
Don't settle for another mediocre speaker at your next event. Bill Cates, CSP, CPAE will work with you to deliver **highly-tailored keynotes, workshops, and breakout sessions** that are *radically relevant* for your group, and designed to inspire action.

Bill has been **speaking internationally for over 25 years** and inducted into the prestigious **Speakers Hall of Fame®**. With our numerous reinforcement tools, you can be assured of a message that resonates and **produces real results**.



“Bill gave us the **perfect blend of humor and motivation**. Our members went from nodding, to taking notes, to laughing, and back again.”

Bonnie Godsman
President, GAMA International



www.BillCatesSpeaking.com



BUILD A NETWORK OF REFERRAL PARTNERS

A Referral Partner (or Center of Influence) is someone who may never become a client or customer, but has the ability to provide you with introductions to high-level prospects.

Having a network of Referral Partners who act as advocates for your business is one of the most effective ways for you to maintain a pipeline of perpetual revenue.

The beauty of Referral Partners is that they essentially serve as your own personal sales force... and you don't have to pay them a penny! How's that for a return on investment? Or should I say, "Return on Relationship?"

Are you maximizing the potential of your Referral Partners? Have you embraced this strategy as one of the key pillars of your business by formalizing your referral partnerships?

Action Steps

Whether you need to cultivate new relationships or fine tune existing ones, there are 3 basic steps you want to take to further develop your network of Referral Partners:

1. Identify all the natural sources of Referral Partners based on your profession.

For example, some common Referral Partners for financial advisors are attorneys and CPAs. And don't be afraid to get creative. For example, I've seen many financial advisors create successful referral partnerships with clergy.

2. Maximize your referability. Once you've established the relationship, you must ensure your Referral Partner truly understands who you serve the best, how to recognize the possible fit, how you serve them and how you and your team will receive the folks they send your way. Keep your Partners in the loop; let them know that you followed through on their introduction.

3. Teach Your Referral Partners how you'd like to be connected to good prospects. Do you want to be introduced at the Referral Partner's office? Do you prefer to meet the prospect over a meal, at one of your client-appreciation events, or maybe through a simple e-mail or text message "handshake."

Ways to Master the Cates System™

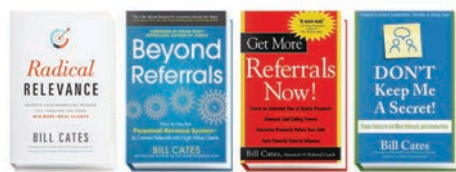
1

Bill's FREE Weekly Tips

Join Bill's email community to receive his high-content weekly messages, full of business building tips and strategies. By subscribing, you'll also be kept in the loop with upcoming training events, free resources, and more.

To subscribe, visit: www.ReferralCoach.com/resources

2



Bill's Books

Bill Cates is the best-selling author of 4 books - *Don't Keep Me a Secret*, *Get More Referrals Now*, *Beyond Referrals*, and *Radical Relevance*. Visit Amazon.com today to get your copies and start uncovering the keys to exponential growth.

To subscribe, visit: www.amazon.com/author/billcates

3



Online Video-Based Training

The Cates Academy for Relationship Marketing™ will teach you Bill's proven process for multiplying your best clients through referrals & introductions - conveniently on your schedule, 24/7. Individual memberships and corporate packages are available.

Learn more at www.TheCatesAcademy.com

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1:1 Coaching

Knowledge without action is useless! Bill Cates will work closely with you and/or your team to fully integrate our proven system into your business. We offer highly-customizable coaching packages for individuals and groups of all sizes.

To learn more, visit www.CoachCates.com

Follow us on social media for tons of **FREE** resources!



Clients Rave About the Cates System™

What Individuals Say



In 6 months alone, the Cates' system has helped me to generate **26 referrals** into our pipeline., **resulting in 3 new clients and \$1,200,000 in client assets.**

Michael Oana
Des Moines, IA



"After learning the Cates system, **I doubled my income** that same year. The following year I **grew by another 40%**. Cates' system works. I highly recommend learning everything you can from Bill Cates."

Aquiles Larra
New York, NY



"Bill Cates' program has had a huge impact on our business. We have acquired **5 new clients worth \$10 million**. The results have been remarkable. I only wish we had learned Bill's process sooner!"

Al Fox
Mt. Laurel, NJ

What Leaders & Managers Say



"We are seeing tremendous results after implementing the Cates System into our business. **Referral sales are up 400%** in just one year."

Jerry Baker,
Exec. VP of Sales
Decatur, AL



"Cates has **revolutionized the thought patterns of our reps** and allowed us to become the #1 agency in our company. We use a combination of bringing in Bill for live sessions and his brilliant online learning platform."

Bruce Davison
CEO
Wichita, KS



"I started using Bill's process for recruiting new reps. It worked so well that I now make sure that all of our reps learn and apply the Cates system. **Bill's strategies create confidence that turns into results.**"

Terri Garner
Recruiting Director
New York, NY