On-Demand Learning & Coaching Platform

Featuring Bill Cates, CSP, CPAE

President – Referral Coach International

SELF-STUDY COURSES

Course 1 – Maximize Your Referral Results

Suggested Pre-requisite to Other Courses

Lesson 1 – Get Ready for a Great Learning Experience that Produces Results

Lesson 2 – Best Practices to Maximize Your Investment of Time & Dollars

Lesson 3 – What Does Your Referral Gap Look Like?

Lesson 4 – What is Your Referral Gap Costing You? (Out of pocket and Missed Opportunity)

Lesson 5 – Why Do You Have a Referral Gap and What Can You Do About It?

Lesson 6 – The Full Benefits of Referrals & Personal Introductions (More than you think!)

Lesson 7 – Develop a Referral Mindset to Expand Your Opportunities

Lesson 8 – Develop Your Ideal Client Profile to Attract the Type of Clients You Want

Lesson 9 – Enhance Your Referability to Get Referrals & Introductions without Asking

Course 2 – Become Super Referable to Get Referrals without Asking

Turn Satisfied and Loyal Clients into Engaged Clients who Provide Referrals and Introductions

Lesson 1 – The Missing Ingredient in Becoming Super Referable

Lesson 2 – Become Referable Quickly with Prospects – Part I

Lesson 3 – Become Referable Quickly with Prospects – Part II

Lesson 4 – The New Client Experience – Part I

Lesson 5 – The New Client Experience – Part II

Lesson 6 – The On-Going Client Experience

Lesson 7 – Keep the Value Flowing or Your Clients Might Be Going

Lesson 8 – Turbo-Charge Your Referrals with Business Friendships

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Course 3 – Asking for Referrals and Introductions without Pushing or Begging

Be Proactive for Introductions in a Way that Strengthens All Your Relationships

Lesson 1 – Face Your Fears & Concerns to See the Opportunities Right in Front of You

Lesson 2 – The Importance of Checking In with Clients (Creates referrals without asking for them)

Lesson 3 – The Value Discussion – Starting Point for Referrals & Introductions

Lesson 4 – The Value Discussion in Action – a Proven Process

Lesson 5 – The VIPS Process™ – Part I – The Big Picture (Value Discussion)

Lesson 6 – The VIPS Process™ – Part II (Importance and Permission)

Lesson 7 – The VIPS Process™ – Part III (Suggested Names & Categories)

Lesson 8 – Using LinkedIn to Identify Prospects & Create Connections

Lesson 9 – A Formula for When to Ask New Clients for Referrals

Lesson 10– Diffusing Referral Objections – No Pressure & No Begging

Lesson 11 – Backing Off with Confidence and Professionalism

Lesson 12 – Role Play Simulation to Build Your Skill and Confidence (You're going to love this!)

Course 4 – Turn Referrals into Connections

Referrals aren't enough – Turn them into Introductions and Appointments

Lesson 1 – Obtain a Personal Introduction – So the Prospect is Expecting to Hear from You

Lesson 2 – Use a Personal Introductions Journal – A Great Tool

Lesson 3 – The 5-Step Introductions Process – Part I (A Proven Process!)

Lesson 4 – The 5-Step Introductions Process – Part II (Create a Solid Connection)

Lesson 5 – Getting Introduced with Email – Make it Easy for Your Referral Source

Lesson 6 – Contact Referral Prospects to Set Appointments that Stick!

Lesson 7 – Receive Referrals Properly – Create Referral T.R.U.S.T (To Get More Referrals)

Lesson 8 – Role Play Simulation to Build Your Skill and Confidence

Skill Mastery – Role Play Video Demos

Skill Mastery – Interactive Role Play Exercises

Skill Mastery – Audio Learning Series

REINFORCEMENT RESOURCES

Rapid Fire Referrals – The Habit Make
Short high-content reinforcement lessons over 52 weeks (video, audio, text)

Interview Series – Learn from the Masters
Audio interviews from top producers and marketing masters.

Referral Fitness Series – Fun, Actionable Ideas
Brief, fun, and though provoking videos (1-2 minutes)

LEADERSHIP CENTER

Course for Managers and Leaders – Build and Sustain a Thriving Referral Culture

Lesson 1 – **What Does Your Firm's Referral Gap Look Like?**

Lesson 2 – **What is Your Referral Gap Costing Your Firm and YOU?**

Lesson 3 – **Why Does Your Firm Have a Referral Gap?**

Lesson 4 – **Barriers that Keep Managers from Mastering & Coaching Referral Strategies**

Lesson **5 – The T.R.A.C. Leadership Model – Part I – Training and Role Modeling**

Lesson 6 – **The T.R.A.C. Leadership Model – Part II – Accountability for Results**

Lesson 7 – **The T.R.A.C. Leadership Model – Part II – Culture Building to Sustain Results**

Referral Champions – Group Training Program

Course 1 – Get Referrals without Asking
Become Super Referable with Client Engagement

Module 1 – **The Prospect Experience**

Module 2 – **The New Client Experience**

Module 3 – **The On-Going Client Experience**

Course 2 – Ask for Referrals & Introductions
Leverage Client Satisfaction and Loyalty

Module 1 – **Promote Referrals**

Module 2 – **Use the V.I.P.S. Method™**

Module 3 – **Address Concerns and Objections**

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Course 3 – Create Solid Introductions
Create Connections that Turn into Appointments

Module 1 – **Use a Collaborative Approach**

Module 2 – **Optimize Email & LinkedIn**

Module 3 – **Set Appointments that Stick**

Course 4 – Use the Power of Referral Partners
Grow Your Network of Advocates for Your Business

Module 1 – **Find the Best Advocates for You**

Module 2 – **Start Building Your Network**

Module 3 – **Create Referral T.R.U.S.T.**

Module 4 – **Build Your Referral Team**

OTHER RESOURCES

1. 60-Day Action Plan
2. Success Guides for Each Course
3. Referral Scripts Book
4. Referral Scoreboard Activity Tracker
5. Role Play Skill Builders
6. Frequently Asked Questions (and Answers)