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Keynotes & General Sessions*

Don't Keep Me a Secret – Tap into the Power of Word of Mouth, Referrals, and Introductions

Are You Playing to Win? – Closing the Gap between Where You Are and Where You'd Like to Be

Telling Your Story, Selling Your Value – Discover and Communicate Your Authentic Value Proposition to Win More Clients and Referrals

Educate, Entertain, Entice – Speaking Skills to Win More Business

No-Pressure, High-Impact Selling – A New and Dignified Approach to Winning More High-Level Sales

The Customer Loyalty Myth – The Missing Link to Leverage Client Satisfaction and Loyalty into Exponential Growth

Breakouts / Workshops

Creating Unlimited Referrals without Asking – Use Client Engagement Strategies to Become Super Referable and Appropriately Proactive

Approaching Clients for Referrals without Pushing or Begging – Yes! It's Possible to Ask for Referrals in a Way that Actually Feels Natural

Go Beyond Referrals – Get Solid Connections to Prospects and Set Appointments that Stick

What Makes You Different? – Your Secret Weapons to Differentiation in a Look-A-Like Marketplace



Don't Keep Me a Secret!

How Do You Stack Up Against the Best at Acquiring New Clients?

What are top professionals, salespeople, and business owners doing right now to acquire more and better clients through referrals, personal introductions, and other relationship marketing strategies? What critical decisions have they made and effective strategies have they put in place to continually attract new clients?

In this unique program, your people become the stars. Bill will interview a number of your attendees (prior to the conference) to glean best practices, perspectives, and stories to highly customize a fun and energetic program that will inspire and motivate more effective action and produce results.

You Will Discover How to:

- ✓ Recognize limiting thinking that may be limiting your actions and results.
- ✓ Solidify client loyalty and maximize your Referability Factor™.
- ✓ Generate referrals without even asking for them.
- ✓ Talk to clients about introductions without begging or pushing.
- ✓ Turn referrals into personal introductions and appointments.

Create a culture of referrals and personal introductions from clients – so they know how to talk about you and are connecting you with qualified prospects who can benefit from your value.

Are You Playing to Win?

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

The most successful at their job do what the less successful are unwilling to do. Success in every endeavor, therefore, boils down to confidence. In the absence of confidence is what? Fear? Doubt? Certainly inaction.

Bill doesn't believe in helping people take their performance to "the next level" unless they are clear on what that next level is. Clear intentions produce clear results. Vague intentions produce vague results.

Reach Your Peak Performance by Discovering:

- ✓ 3 strategies to create a crystal clear vision of what your "next level" looks like.
- ✓ A surefire method to discovering your blind spots, limiting beliefs, and mistaken assumptions that sabotage you reaching your full potential.
- ✓ 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.



Telling Your Story – Selling Your Value

Set Yourself Apart from All Competition by Communicating Your Value in Way that Captures New Business and Creates

Fundamental to your business success is your ability to discover, articulate, and communicate your value. Over many years of helping individuals and organizations through a process to maximize their Authentic Value Proposition™, our experience has been that most people (and businesses) are not particularly good at communicating their full and true value. Perhaps they've never really done the work it takes. Or, perhaps, they're not revisiting it from time to time.

It's Time for You to Discover:

- ✓ 2 Proven Ways to Identify Your **Full** Value
- ✓ 6 Questions to Which You **Must** Know the Answers
- ✓ Tapping into the Power of Your “Personal Why”
- ✓ The 5 Critical Elements for Your Effective Value Proposition
- ✓ 2 Strategies to Put Your Value Proposition on Steroids

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

Educate! Entertain! Entice!

Speaking Skills to Grow Your Business

Speaking in front of a group of prospects can be an ideal way to gain credibility and drive interest. Are you winging it when it comes to speaking in front of groups – relying on your “natural ability?” Have you finely tuned your skills so that your audience connects with both your value and with you?

Are you authentic and natural or are you stiff and slightly distant? Bill Cates was inducted into the Professional Speakers Hall of Fame in 2010. It would be hard to find someone more qualified to teach the skill and art of impactful presentations. Are you ready to win more business?

You Will Discover:

- ✓ The best way to open your presentation that pulls your audience in.
- ✓ How to get the audience to connect with you so they listen and learn.
- ✓ The right and wrong ways to use humor.
- ✓ How to use audience interaction when appropriate.
- ✓ The power of Power Point – but only if done correctly.
- ✓ How to create a compelling call to action.
- ✓ How to follow up with audience members to keep the conversation going.

Speak and grow rich!



No-Pressure, High-Impact Selling

A Modern Approach to Gaining High-Level Clients

What stops most people from converting prospects to clients? Lack of confidence, lack of a clear path to follow, or both. Most people wing it when they should be following a proven process. Bill Cates' proprietary *Brainstorm Selling Process*™ will eliminate these common problems! You'll approach every new opportunity with new awareness, skill, and confidence.

You Will Discover:

- ✓ A new way to approach "sales" that will change your results forever!
- ✓ 7 ways to build trust that makes the entire process easy and effective.
- ✓ How the right questions will bring value and keep the process moving.
- ✓ How to about your value in a way that generates genuine interest.
- ✓ A simple method for addressing objections – so you no longer fear them!
- ✓ How to turn a prospect into a client without tricky or manipulative *closing* techniques.

Move through Your Prospect's Inertia to Create Positive Decisions

The Customer Loyalty Myth

The Missing Link to Leveraging Customer Satisfaction and Loyalty for Exponential Growth

You work hard to satisfy your clients and earn their repeat business. Your Net Promoter Scores show that you have many clients willing to recommend you to others. Now what? What is the *missing link* to exponential growth? It means *leveraging* that loyalty into word of mouth, referrals, and introductions.

Most businesses see word of mouth and referrals as important, but have no formal programs or processes in place to turn a customer's willingness to refer into action. Bill Cates how you can leverage your hard word to create a culture of your clients engaged in promoting and introducing you to others.

You Will Discover:

- ✓ Why customer loyalty is not always enough for exponential growth.
- ✓ The factors that need to be in place to make customers want to refer you.
- ✓ How to turn "willingness to refer" into a tangible increase in revenue.
- ✓ What companies are doing to leverage their Net Promoter Scores.
- ✓ How Social Media can be linked with traditional methods for great results.

This session can be tailored to any level of an organization or size of company.

DON'T KEEP ME A SECRET



BY **BILL CATES**,
the The Referral Coach

We all know the value of compound interest. You enjoy a growth model where $1 + 1 = 3$. Well a good referral system is like creating compound customers. The benefits of working from referrals are plentiful:

1. Referrals cost you nothing to acquire.
2. You start at a higher point of trust, borrowed from the person who referred you who has already established trust with your prospect.
3. Selling price is much less of an issue. Referred prospects value working with someone who was recommended more than getting the lowest price possible.
4. Your sales process moves faster since your prospect is already predisposed to doing business with you.
5. Your win rate is higher – often 10-30% higher than with other lead sources.
6. Deal sizes are often larger.
7. Your new referred clients are more likely to follow your suggestions, since their referring colleague followed your recommendations.
8. Referrals beget referrals. If that's how they met you they will be willing to do it for others.
9. It's a fun way to do business!

To make referrals work for you, two things are required. You need to be referable. And you

need to be proactive. Move this momentum into a great introduction and will find yourself sailing down the path to making your next sale.

Be Referable

I regularly teach sales people how to get referrals without even asking for them. And it comes down to creating an exceptional experience that your customers can't help but want to tell others about. Remember that your customer is staking a piece of his or her reputation by referring you. If you turn out to be a bozo, then their colleagues will start to wonder about them as well. On the flip side, as you prove yourself to be a trustworthy, reliable giver who anticipates needs and always has your customers' best interests in mind, your customers look smart to have found you and have you working on their behalf.

Be Proactive

Providing exceptional service is not enough to get your referral engine running strong. You also have to be proactive. Delighted customers aren't necessarily going to think about spreading the word about the great assistance you have provided them.

You can gently remind them that they can help you as a way to show their appreciation. And if you are referable, they do want to help you. We like to reciprocate kindness to those who have helped us.

When your customer compliments the great help you have provided, now is not the

Your customer is the best one to define why her colleague is pre-qualified to be a good fit for you. This is social engineering in action.

time to be shy. Respond with, "Thanks, and you don't have to keep me a secret." You may open the door for the perfect opportunity to get a referral.

The referral is only step one though. You need to proactively turn that into an introduction so you can start the sales process a skip ahead.

Get Introduced

I am often asked if there is a best way to get introduced to a new prospect. The short answer is "not really." The best way is what works for all parties involved.

Your customer is probably the one to decide the best method of introduction, be it a social visit, an email, or a call. Asking two questions will get you to an introduction that will feel great for you and your new prospect:

1. How do you think 'Jane' would prefer you to introduce me to her?
2. What do you know about her work/situation/etc. that makes you think she will be interested in talking with me?

Your customer is the best one to define why her colleague is pre-qualified to be a good fit for you. This is social engineering in action. You can legitimately

learn about personal details in a way that won't seem creepy to your new prospect, since the knowledge came from someone they already know.



Referrals are the best way to grow your sales fast if you adopt a sound approach. Memorable experiences are meant to be shared. Make it easy for your customers to share what you have done for them and help you at the same time.



Bill Cates, a.k.a. The Referral Coach, is the author of three popular books on

referrals: Beyond Referrals, Get More Referrals Now! and Don't Keep Me a Secret! He is also the president of Referral Coach International and the creator of The Referral Advantage Program™. In 2010 he was inducted into the Speaker's Hall of Fame.

Reaching the Hard-to-Reach, Top-Notch Prospects

BY BILL CATES – PRESIDENT, REFERRAL COACH INTERNATIONAL

In this era of harder-to-reach prospects – especially among the affluent and wealthy – *Social Prospecting* has become the business-building model of choice for many successful advisors/agents. To my mind, *Social Prospecting*, quite simply, is the use of social environments to identify, meet, and grow relationships with qualified prospects. For over 12 years, I've been teaching financial professionals how to build a thriving referral-based business. Not only is this an effective marketing strategy, it's also a lot of fun!

Why Does Social Prospecting Work?

While many of your new prospects are ready to discuss their financial situation and financial goals with you on the very first appointment, many others are not. Many solid prospects would prefer to meet you in a more social setting first; to get a feel for you – do they like you, do they trust you, etc. Using referral events and other social prospecting tactics, you can reach many more high-level prospects than you may be reaching now; especially the affluent and wealthy.

Examples of Social Prospecting

Social Prospecting encompasses a wide range of activities. Here are a few you might consider:

- Client Appreciation Events
- Referral Events (Event Marketing)
- Community Service Activities
- Charity Events (Philanthropic Endeavors)
- Club Memberships
- Hobby or Special Interest Groups

In this issue of Referral Abundance, I'll touch on a couple of these – Client Appreciation Events and Referral Events. In future issues, I'll discuss other social prospecting strategies.

Client Appreciation Events

I'd like to draw a distinction between what are called *Client Appreciation Events* and *Referral Events*. In a nutshell, a client appreciation event is some sort of social gathering (fancy or informal) with the sole purpose of saying “thank you” to one or more clients. The purpose of a referral event, while the activity can be the same, is for one or more clients to bring one or more prospects to meet you.

The trouble I often see with these events is that advisors try to turn a client-appreciation event into a referral event. They try to do a “hybrid.” While hybrids have their place, I believe you will see better results with most of your events if you limit them to one purpose – either appreciate the business (to build loyalty), or host an event where your clients are expected to introduce you to one or more prospects.

Client-appreciation events allow you take your client relationships to new levels of business friendship that probably wouldn't be possible through the normal course of business activities. This dynamic not only enhances client loyalty, it also makes you more referable. People give referrals to people they like and trust. Client-appreciation events contribute significantly to this dynamic.

Types of Client Appreciation Events

- Holiday Parties
- Picnics
- Sporting Events
- Wine & Cheese Tastings
- Chocolate Tastings
- Intimate Fancy Dinners
- Golf Outings or Swing Clinics
- Boat Outings
- Ski Trips
- Theater Events
- Cooking Classes

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Referral Events that Attract Qualified Prospects

You host a referral event for the express purpose of your clients introducing you to prospects in a social environment. Be very clear with your clients about the purpose of this event. You'll have much more success. As a rule, you want to keep your referral events much smaller than your client-appreciation events. Remember, the purpose of a referral event is to create a solid connection between you and your new prospects. If you have too many prospects to meet, you may not connect well with any of them.

Referral Events – Case Studies

THEATER EXCURSION – Don Zajac is a financial advisor near Detroit, MI. Every year Don arranges for a 2-day theater trip via motor coach; alternating between Chicago and Toronto. Don arranges the bus, theater tickets, hotel, and dinner. His very affluent clients and their very affluent guests actually pay their own way. He just makes all the arrangements.

Over the course of 2 days he spends several hours on the bus with these folks, has dinner and breakfast with them, and a wonderful evening at the theater. Don told me that “People get off the bus, shake my hand, thank me for a wonderful time. Then they say ‘we have some questions about our finances, do you think you can find some time for us?’” Don gets several wealthy clients this way each year – well worth his investment in time and effort.

THE CHEF’S TABLE – Another referral event idea is The Chef’s Table. It’s the kind of event that clients like to attend and feel comfortable inviting a guest to. The chef is usually involved in this event. Sometimes he/she prepares a special entrée or dessert just for the group. They can also recommend wine pairings for the meal.

If you want to make this an evening no one will forget, have your guests picked up from their homes in a limo. Talk about the “wow” factor! For a personal touch – and a nice excuse for getting back with your clients and their guests – take some photographs of the attendees. Hire a professional, if you can afford it.

LET’S TAKE A BOAT RIDE – I know an advisor who uses his boat all summer long as a way to entertain clients and their guests. “Bring a guest and you get to spend the day on my boat.” What a way to have a fun summer, celebrate your current client relationships, and prospect for new business.

There are two things I particularly like about “boat prospecting.” First, it’s a small group, so you get a lot of time with everyone. Second, you get to know them in a way that has absolutely nothing to do with your business. You go through an adventure together – especially if you do some fishing or other water sports. Adventures like these almost always contribute to people trusting each other more.

Getting Guests to Referral Events

I recently had the pleasure of interviewing Bill Cupach. Based in Cleveland, Bill knows just about all there is to know when it comes to putting on successful events (he was an event planner before he joined the financial services profession). Bill told me that, “The advisor is the *Sponsor*, and the client is the *Host*.” Which is a better phone call to the guest? “George, my financial advisor, wants to take me to dinner and bring you along as a guest.” OR “George, I’m hosting a dinner party at Chez Expensive to introduce you to our personal financial advisor who might prove to be a great resource for you. It’s going to be a lot of fun. Are up for it?”

The Wow Factor!

Client appreciation events and referral events need not be expensive propositions. The key is handling all the details – to the extent that your guests really notice. Make your invitations stand out – not like the run-of-the-mill wedding invitations that so many advisors use. Have someone available to greet them as they arrive to the event. Make sure the directions are perfectly clear or, better yet, send car to pick them up. Call all your guests before the event to check on special food restrictions or preferences. And, most importantly, follow up. Don’t host a referral event if you don’t set aside time to follow up with your guests. Call your client first, if you like, but call the prospect within 48 hours of the event. **RA**

Free Report

THE 10 MOST COMMON MISTAKES ADVISORS MAKE WITH EVENT MARKETING AND HOW TO AVOID THEM

To get your copy go to:
www.ReferralAbundance.com



10 Proven Ways to Get Referrals *Without Asking*

By Bill Cates – President, Referral Coach International

I'm a big believer in asking your clients for referrals. And I know that many financial professionals just can't seem to crack through their barriers to approach their clients for referrals. All is not lost. Here are 10 proven ways to promote referrals to your clients. About 70% of the time, these techniques will result in your clients giving you referrals at some time in the future. So consider them as "planting the seed" for referrals. However, you can expect that about 30% of the time, these techniques will generate referrals **right on the spot**. These little things you do now will act in the same way compound interest turns consistent small deposits into riches. You'll reap the rewards for years to come.

To show you how practical these techniques are, I'll bring most of them to life with a sample script.

1 **Reminder of Confidentiality.** "George, there's one thing I want to run by you. Many of my clients like to introduce me to others whom they think should know about the important work I do. I just wanted you to know that should that opportunity present itself to you, the work we do is always kept completely confidential. They will never learn about your financial situation from me and vice versa. Does that make sense?"

2 **Who You Serve the Best.** "George and Martha, there's something I want to mention to you. Many of my clients like to introduce me to others whom they think should know about the important work I do. Should that ever come up for you, it's good for you to know for whom our processes are best

suited. These days, our practice is geared toward successful couples like yourself. They usually have children, but not always. Generally they have a combined income of over \$100,000 – some of my clients are even in the \$400,000 range and more. While I don't expect you to know someone's exact financial situation, you probably have a sense. Does this make sense?" [Note: Your profile range may be different, but you get the idea.]

3 **How I'll Contact Them.** "Randy, quite often my clients like to recommend the work I do to others whom they care about. Should that ever come up for you, I thought you should know how I usually like to handle those situations. First of all, I don't like to surprise people with a phone call from out of the blue. I've found that everyone seems to feel most comfortable when they know I'll be contacting them and have a sense of why.

"So, if you identify someone you think I should contact, please come to me first. Together, we'll figure out the best way for us to approach them. We'll do it in a way that suits your relationship and feels comfortable and natural to everyone. If they are

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interested, we'll likely meet for a no-obligation review – as you and I did initially. If they decide they don't care to move forward, I assure you I won't pressure them or become a pest. That's just not my style. How does all this sound?"

4 **"Don't Keep Me a Secret."** I've been teaching this simple phrase for over a dozen years and I've been impressed with two things: 1) how many financial professionals are using this phrase with great success; 2) how often it results in a referral conversation right on the spot. It never hurts a relationship. You're not going to say to a client, "Please don't keep me a secret" and they respond, "I can't believe you said that. Give me my check back."

Tell me. If I ran into a good prospect for your business, how would I know it and how would you like me to introduce them to you?" When you demonstrate a genuine willingness to give referrals, many people will reciprocate with you. This can be a great start to a productive Center of Influence relationship.

6 **Celebrate Referrals.** Every time you meet a new prospect through a referral, celebrate it. Talk about the person you know in common. Tell them "It's great Tom introduced me to you. When I meet folks through referrals like this, it leaves me with more time to serve my clients, instead of spending time *looking* for clients. Make sense?" ("Sure

30% of the time, these techniques will generate referrals right on the spot – without even asking for them.

Try saying this to your clients at the end of value-oriented meetings. Add it as a PS to your handwritten notes. You can even add it to your email signature file and your voice mail. [Editor's Note: *Don't Keep Me a Secret!* is the title of Cates' new book from McGraw-Hill – published September, 2007]

5 **Willingness to Give Referrals.** This is a great technique to get a referral conversation going with anyone who is a small business owner, salesperson, or anyone who needs referrals for their business. You can use it with your prospects, clients, friends, people you meet at social functions, even neighbors you meet at your kids' soccer games. "Frank, you sound like you do pretty good work for your clients.

does.) "And, quite frankly, it's how most people prefer to meet their financial advisor."

7 **Who Should I Thank?** I got this simple technique from my business manager, Karen Hood. One day she was talking on the phone to a prospective client who had called our office to see how we might be a resource for them. At some point in the conversation, she said to him, "By the way, who referred you to us so we know who to thank?" When I heard this, it was like that beer commercial where one of the cartoon characters says, "Brilliant!"

Put the following message on your voice mail. "This is Mike Smith. Sorry I missed your call. Please leave

a message at the tone. And if you were referred to us, please let us know who we need to thank.” This sends the message to all who call you that you get referrals on a regular basis – you are referable. And that you have an attitude of gratitude.

8 Never Too Busy. Here’s a simple one. Just say to your clients, “I’m never too busy to see if I can help your friends, family, or colleagues with the important work I do.”

9 Earn the Right. Tell your clients something like the following (early in the relationship), “One of the ways I know I’m doing a good job for my clients is when they tell others about me. And I know the only way that happens is from me providing first class advice and first class service. I hope that at some point, you will trust me and the work I do well enough to tell others. Fair enough?”

10 By Referral Only. Have “By Referral Only” printed onto your business card. Or when you hand someone your card, write those words on it. It sends the message of importance and exclusivity.

It’s important that you’re not obnoxious about asking for referrals. And it’s equally important that you find soft ways to keep the topic lively in

“Don’t keep the important work I do a secret.”

your clients’ awareness. Promoting referrals in the above ways will do just that. You’ll never hurt a relationship, you’ll plant a very powerful seed that can bear fruit later, and you will often walk away with referrals on the spot. **RA**



"On the way up to your floor, wanna hear my elevator pitch?"

The little things you do now will act in the same way compound interest turns regular small deposits into riches.

BILL CATES' REFERRAL SYSTEM PRODUCES RESULTS

WE CAN SAY ANYTHING WE WANT, BUT OUR CLIENTS SAY IT BETTER!



“We’ve received great feedback on your presentation at LAMP. **You delivered the perfect mix of high-level content, humor, energy, and motivation.** Our audience members (2,600 strong) went from taking copious notes, to laughing, and back to taking notes again.”

– **Bonnie Godsman**

Senior Director, Meetings & Corporate Relations – Falls Church, VA



“Because of your system, I qualified for our Leaders Club my very first year (which was only 6 months long) and every year since. The biggest complaint amongst advisors is they don’t have enough people to call, which I believe is their own fault. I can honestly say I probably would not have made it had I not been introduced to your system.”

– **Gary Yaglenski**

Perkasie, PA



“We have incorporated Bill Cates’ system (via live programs and video-based training programs) into our agent training system. Our agents find this system to be very effective for obtaining quality referrals. **It’s a system that’s transferable to both new and veteran agents.** Quite simply, the system works!”

– **Lee Bloomingdale**

Manager of Field Operations – Omaha, NE

Is Your **Referral System** Producing These Kinds of **Results?**



"In my 20 years in insurance, this is the best tool I have seen in terms of getting referrals. When they put the system into practice they always see great results. Our managers are using the same process for recruiting."

– Keith Lang

Sr. Director of Agency – Gilbert, AZ



"Your referral program has had a huge impact on our practice. **Your system has been a permission slip for us to talk to our clients about the experience they have had with us and then have them share that experience with others.** We have acquired 5 new high-level households with assets totaling \$10 million. This has been remarkable. I wish we had discovered this sooner."

– Al Fox

Cherry Hill, NJ



"I have been in the business for 24 years and was never comfortable asking for the dreaded word: "referrals." I now use your word crafting and it **WORKS!** In the past month I have received 12 qualified introductions and have already set 7 appointments. I am having so much fun with this."

– Robin Wolff

Miami, FL



"Since I started using The Referral Advantage Program I've been getting a steady stream of referrals. I recently got a referral to a new client with \$6 million in assets. He, in turn, referred me to a client with \$5 million in assets. **With the use of this system, my revenues have grown 5-6 times.** It's been phenomenal."

– Larry Briskin

Maple Lawn, MD



“I am having immediate success with your VIPS referral process. I used it with a client couple who have been working with me for 2½ years. It opened the flood gates. They gave me 8 introductions. They offered to write both a letter of introduction and call the ‘referrals’ too! Thankyou. Thankyou. Thankyou.”

– **Mike Morger**
Cincinnati, OH



“I just used your “Agenda” and “Value Discussion” strategies this morning with a new COI and the meeting was awesome. Your process made me more confident – which affected this COI’s response. **I walked away with 5 referrals** and more importantly have solidified a new COI relationship!”

– **Terri Garner**
Recruiting Director – Lansing, MI



“Your referral system is ‘how we do business’ here. Why? It flat out works. The results continue to be great. The word has gotten out and even some of our top producers have gone through the video-training program.”

– **Bob Michael**
Director of Training and Development – Dallas, TX



“We are very pleased with the results of the Referral Advantage Video Training program. Our people are asking and getting more referrals than ever before. One 24-year veteran said that this is the first time she's ever been comfortable asking for referrals. The specific language Cates provides makes all the difference. **Every manager should also be using it for recruiting.”**

– **Lonnie Sesskin**
Training Manager – West Palm Beach, FL

The Proof is in the Results!