



Communicating compelling value to attract ideal clients

Bill Cates, CSP, CPAE



CPE Process

In order to receive CPE credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

Today's speaker



Bill Cates, CSP, CPAE
President, Referral Coach International
[@Bill_Cates](#)



Microsoft

Bill **C**ates will help YOU Make
a Lot of Money

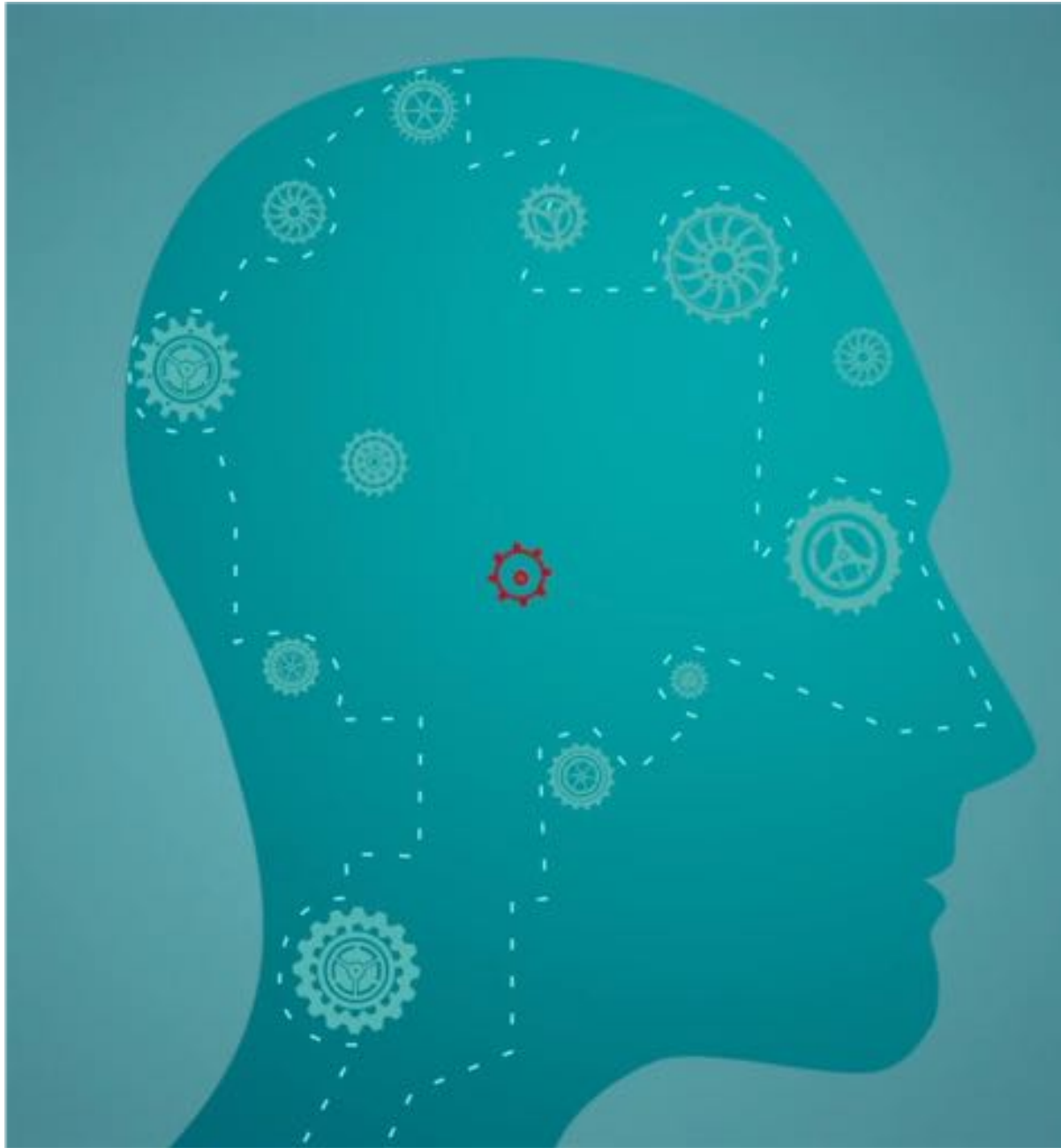


WE HAVE A
PROBLEM!





Our Prospects' Brains Are Overwhelmed



3,000
Marketing
Messages
Every 24
Hours



How does the brain of your prospect cope with this flood of information?



Our brains are scanning...

6 Times Per Second
Am I safe?

3 Times Per Second
Is there an
opportunity?



How do you
get your
messages
through
to prospects?



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.

What is the Ultimate Relevance Machine?

The Google logo is displayed in its classic multi-colored font, with each letter having a slight 3D effect and shadow.



Beyond Referrals: How to Use the Perpetual Revenue System to Convert Referrals into High-Value Clients Paperback – April 18, 2018

by Bill Cates • Author

★★★★★ 14 customer reviews

See all 3 formats and editions

Kindle	Paperback	Audiobook
\$0.00	\$12.98	\$13.97
Free with our Free trial	or save more with Kindle Unlimited	or 1 credit
	or save more with Kindle Unlimited	

More introductions, more appointments, more clients

You have four hurdles in getting 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 only game. *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. We now have a sustainable way for services and acquiring new clients through referrals. This book will outpace you!"

[Read more](#)

[Product information from the publisher](#)

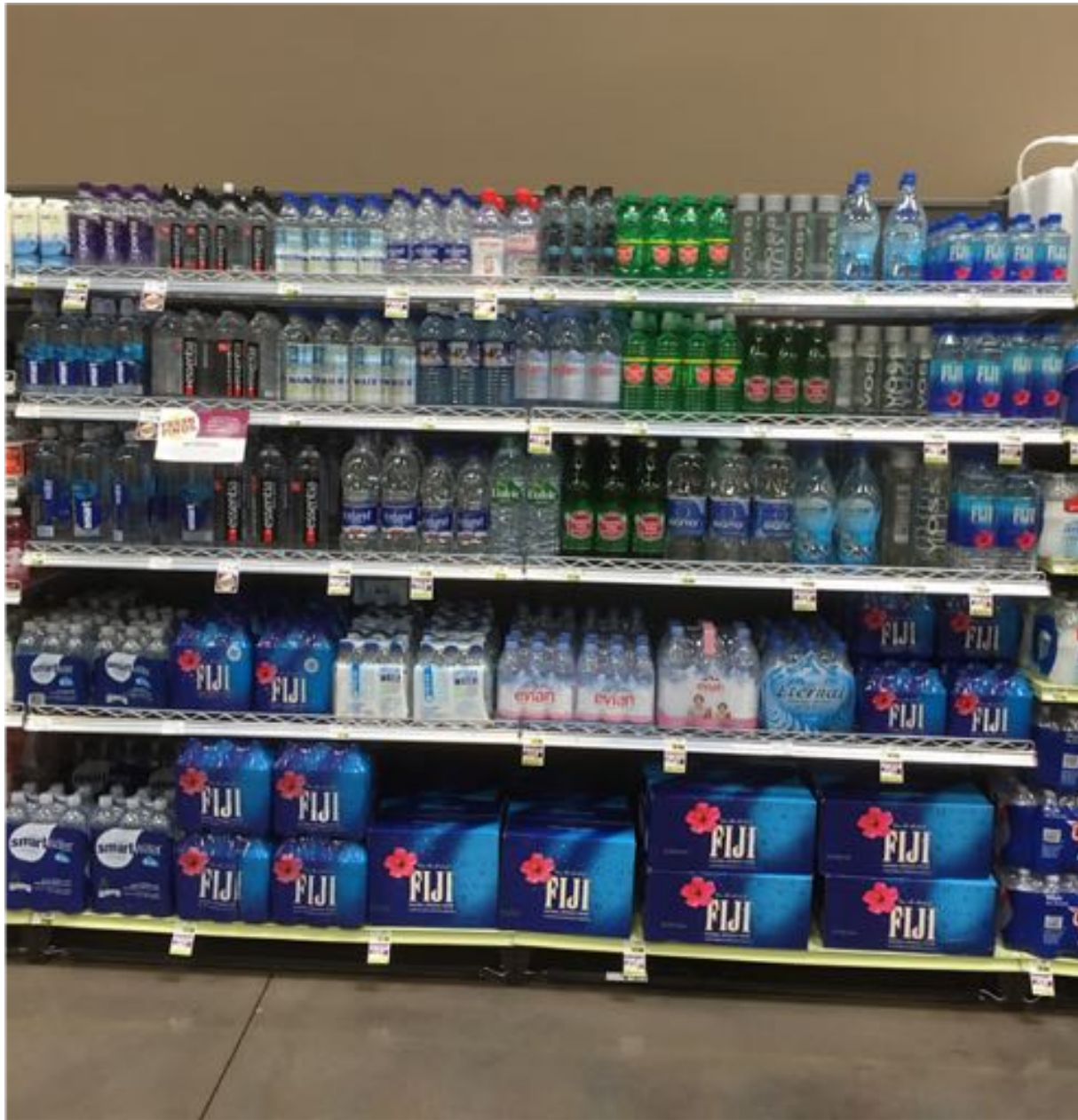


Frequently bought together



- ☒ This item: *Beyond Referrals: How to Use the Perpetual Revenue System to Convert Referrals into High-Value Clients* by Bill Cates • Paperback • \$12.98
- ☒ *The 100% Referral System* by Bill Cates • Paperback • \$10.99
- ☒ *Continuity: How to Build a Successful Business with Referrals and Introductions (Business Models)* by Bill Cates • Paperback • \$3.44

Extreme relevance?





Extreme relevance?

Pollen Count: **9.4**
high

 **PHARMACY**

LAMAR

We Live in a

Radically Relevant World

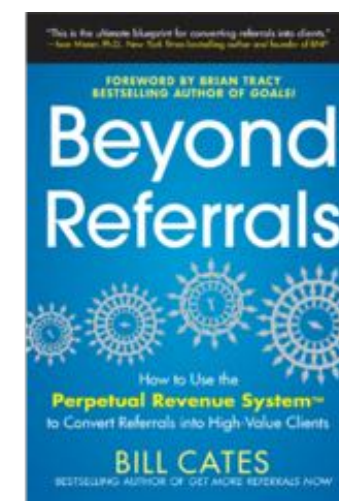
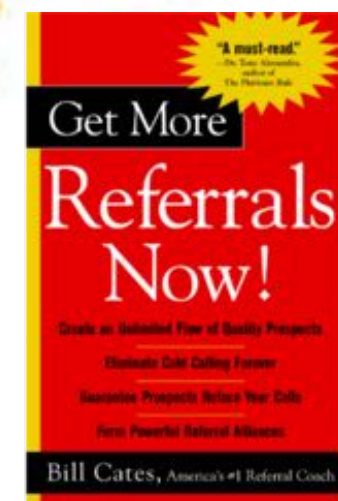
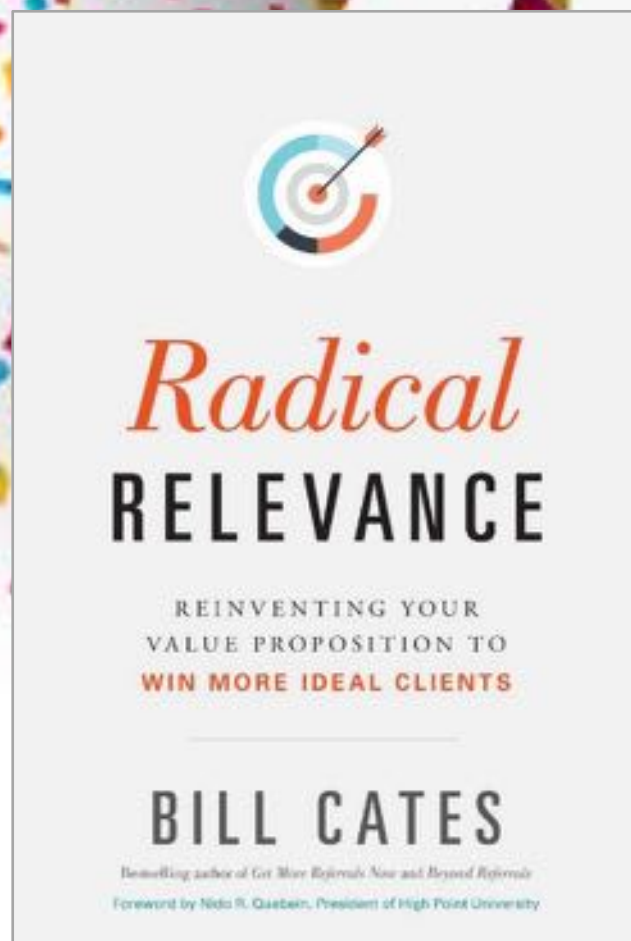


How do you
standout
from other
firms?



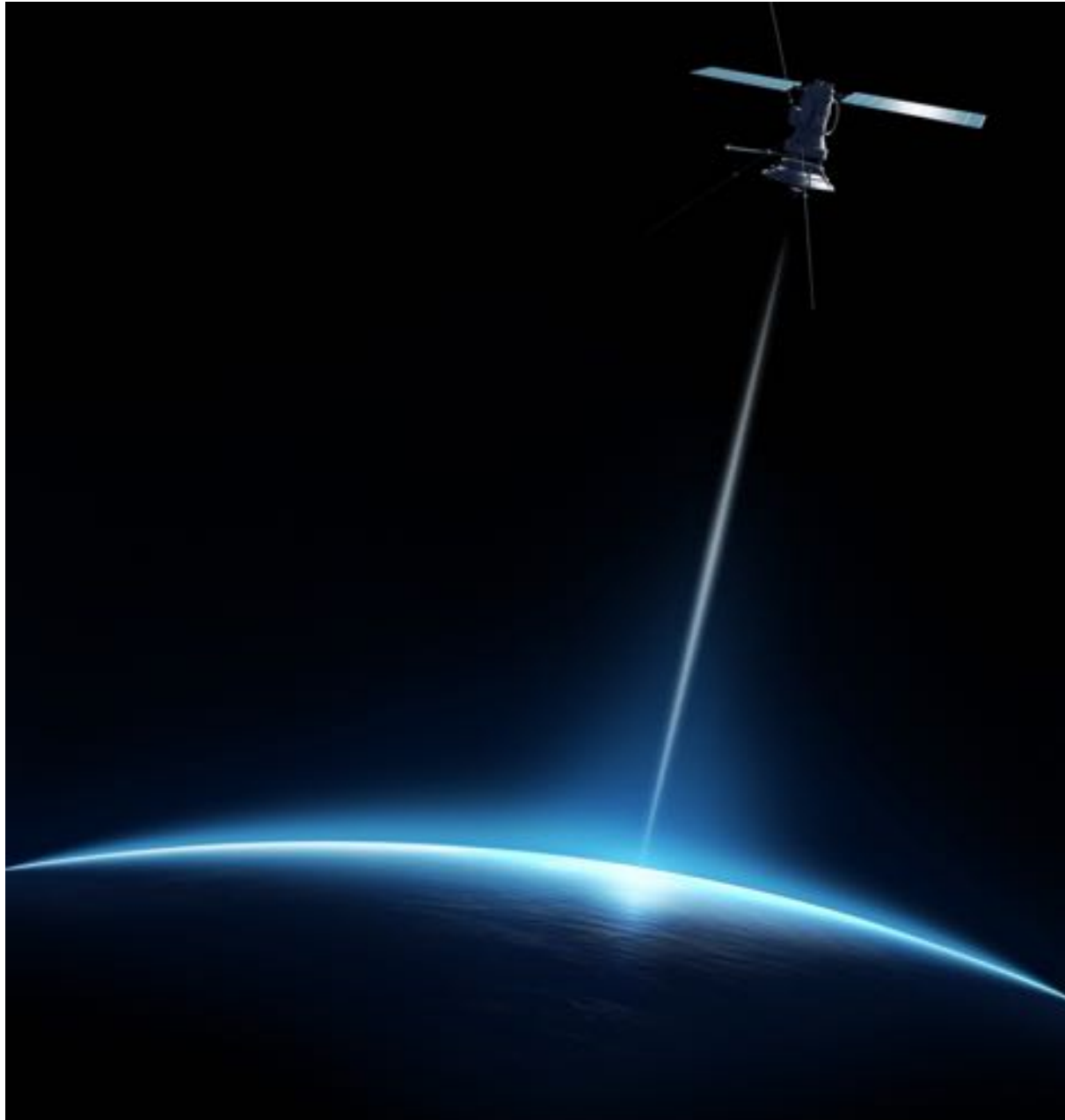
You become
perfectly
relevant for
your perfect
clients.

25 years





Straightest Line to Relevance?



An Introduction from a **Trusted Source**



AGENDA

PART 1 – The Target

PART 2 – The Bullseye

PART 3 – The Message

PART 4 – The Impact

NOT JUST THEORY



Michael Oana
Consultant
Columbia, SC

“Year to date, Bill’s system has helped me to generate 26 referrals into our pipeline and we have added 11 great new clients.”

THE TARGET



Tap into the Growth-Power of a Target Market



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**.



Can you have more than one target market?



A top-down view of a wooden desk. On the left, a portion of a dark laptop is visible. In the center is a small, square chalkboard with a light wood frame, featuring the words 'CASE STUDY' written in white chalk. To the right of the chalkboard is a white mug filled with dark coffee, with a blue-handled spoon resting inside. Below the mug are two sticky notes, one green and one purple, with a blue pen lying on top of them.

CASE
STUDY



SNYDER COHN

CPAs and Trusted Advisors

- 6 teams focused on vertical markets
- Market profiles
- Buyer profiles
- Market influencers
- Trigger questions



Target Market Value Propositions

Medical / Entrepreneurs

Key Attributes for Group to Determine

1. Typical Decision Makers Titles and/or Roles

Managing Doctor, Office Manager, Owners, CFO

2. Typical Influencers – Provide Introductions or Influence the Decision

Attorneys, CPAs, Consultants, Doctors

3. Biggest Challenges & Opportunities Market Faces Related to SC's Expertise

Adding a Partner or Investor, Cash Flow, Finding Good Talent, Resume Review, Accounting, Payroll, Employee Benefits Options, Partnership Structure, Bonus Plan, Buy-Sell Agreements, Corporate Structure

4. Primary Services SC Offers to this Market

Benefits Support, Employee Incentives, Interviewing

5. Triggers that Create Opportunity for SC to Bring Value

Unhappy with the previous firm (poor communication), Unhappy with the internal accountant, Cost-conscious, Outgrowing the current firm, Geographic Expansion, Internet presence.



Trigger Questions

1. Working with other medical practices, we have found physician compensation can be a “hot topic”. Have you reviewed these plans recently?
2. Do you have employees and/or offices in any of the neighboring states? Have you reviewed your Nexus exposure within the past year?
3. What plans do you have in place for Legacy planning/succession/transition to retirement?
4. Were you able to take advantage of the QBID deduction on your personal return for 2018? (Yes, even some medical practices could qualify)
5. How does your office handle planned or unexpected vacations or vacancies in your accounting department?

If you try to appeal
to everyone....



you appeal to
no one!



Erin Gay
Business Owner
Annapolis, MD

“Working with Bill Cates, my entire team is now on the same page with how we view communicate our value.

The net result has been more new clients who fit our profile.”



Questions?





Radically Relevant Thank- You Gifts

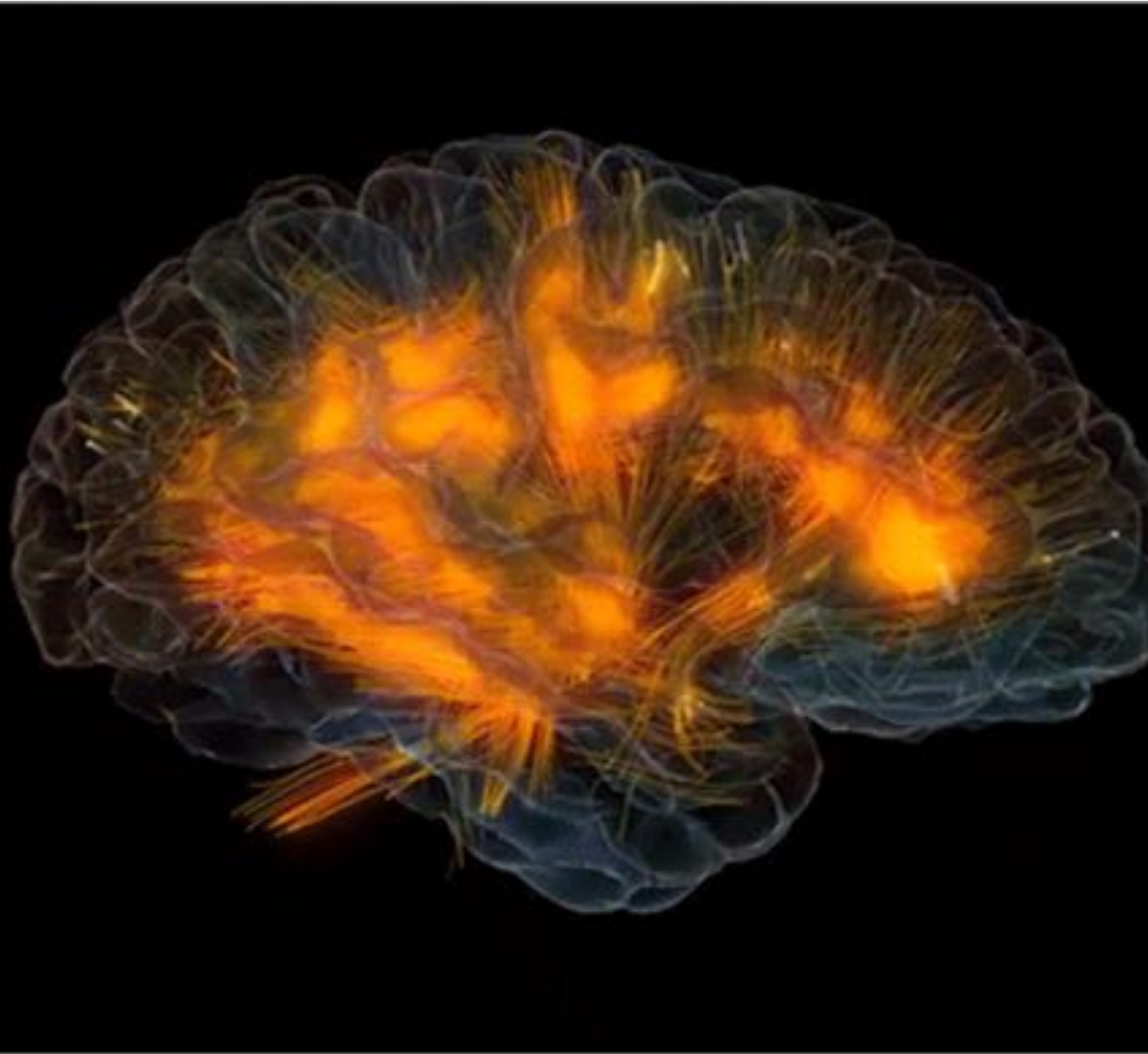


The Neuroscience of Decision Making

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



THE BULLSEYE



A close-up photograph of a hand placing a white puzzle piece into a larger blue puzzle. The puzzle pieces are interlocking, and the white piece is being positioned into a specific spot. The background is a solid blue color.

WHAT IS A
RIGHT-FIT
CLIENT™

FOR?
YOU?



YOUR RIGHT FIT CLIENT

Demographics

- Age
- Gender
- Financials
- Location
- Occupation



YOUR RIGHT FIT CLIENT

Psychographics

- Concerns
- Fears
- Opportunities
- Challenges
- Aspirations



BUYER PERSONA



Buyer Persona

A semi-fictional representation of your Right-Fit Client™ based on your current client base or research into a new target market.



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

How We Can Help

- Better financial projections
- Consult about transitioning
- Introduction to investment banker

What is a Right-Fit Client™ for You?



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

**THE MORE
PRECISE**

**THE MORE
POWERFUL**

THE MESSAGE





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!

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



WHAT makes you different?



When you talk about what makes you different than other firms, do you talk about your **great client service?**

What makes you different?





You **MUST** translate your differentiation into a *clear* and *relevant benefit* that your prospect will recognize immediately!



Questions?

THE IMPACT

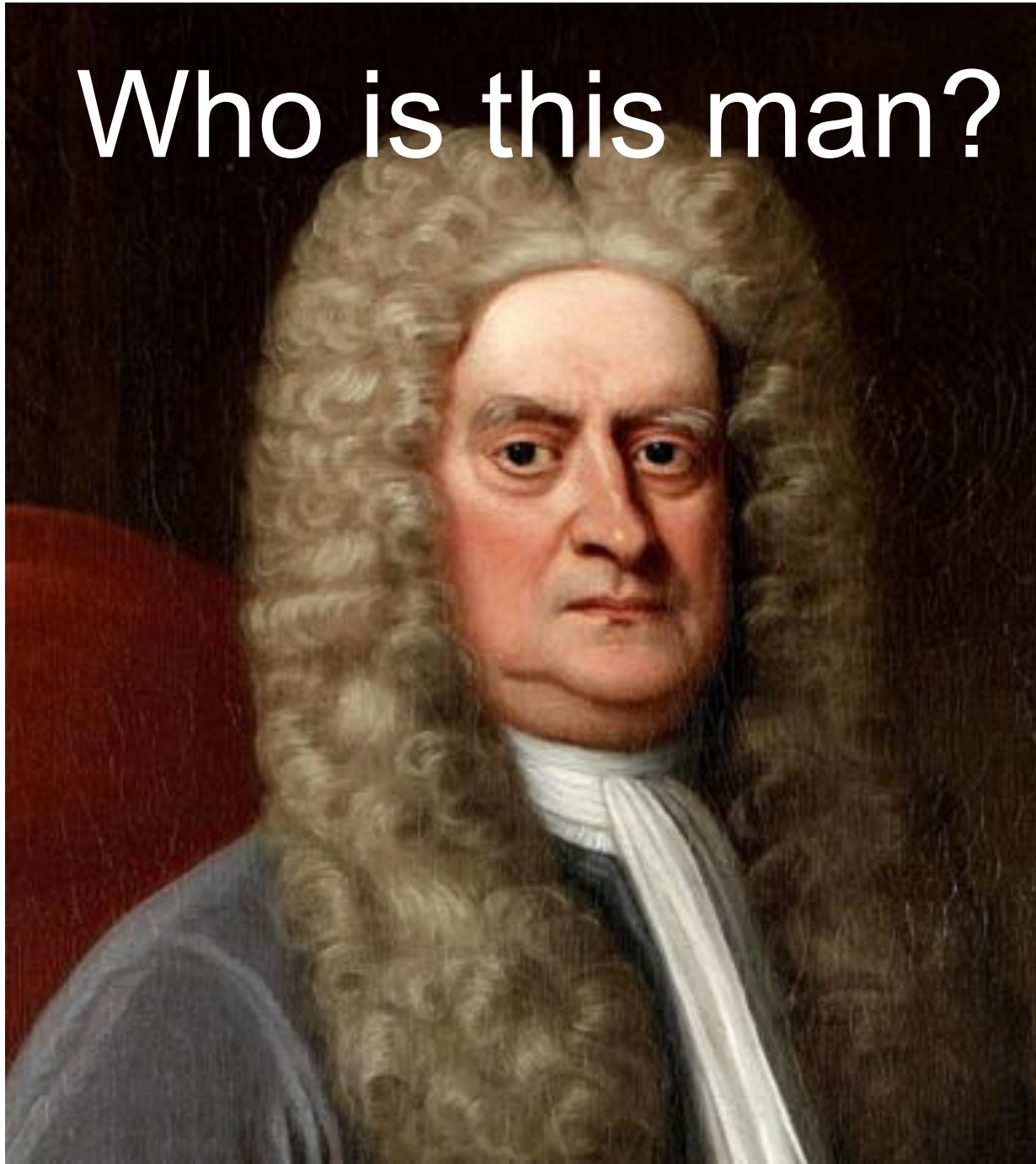




INERTIA

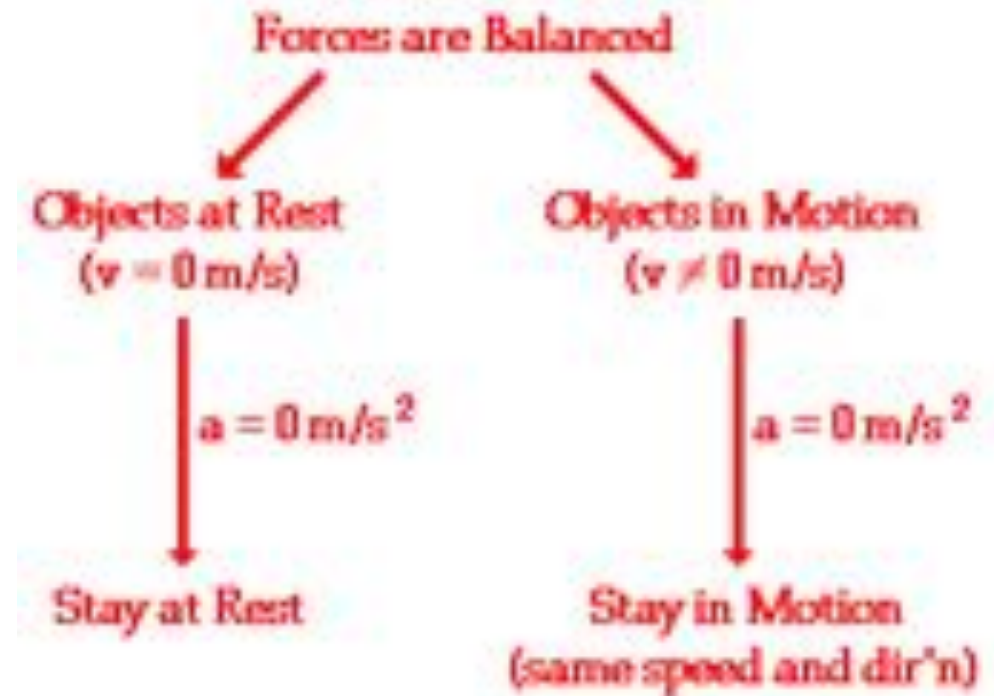
What is the
biggest
“objection”
or challenge
we face with
prospects?

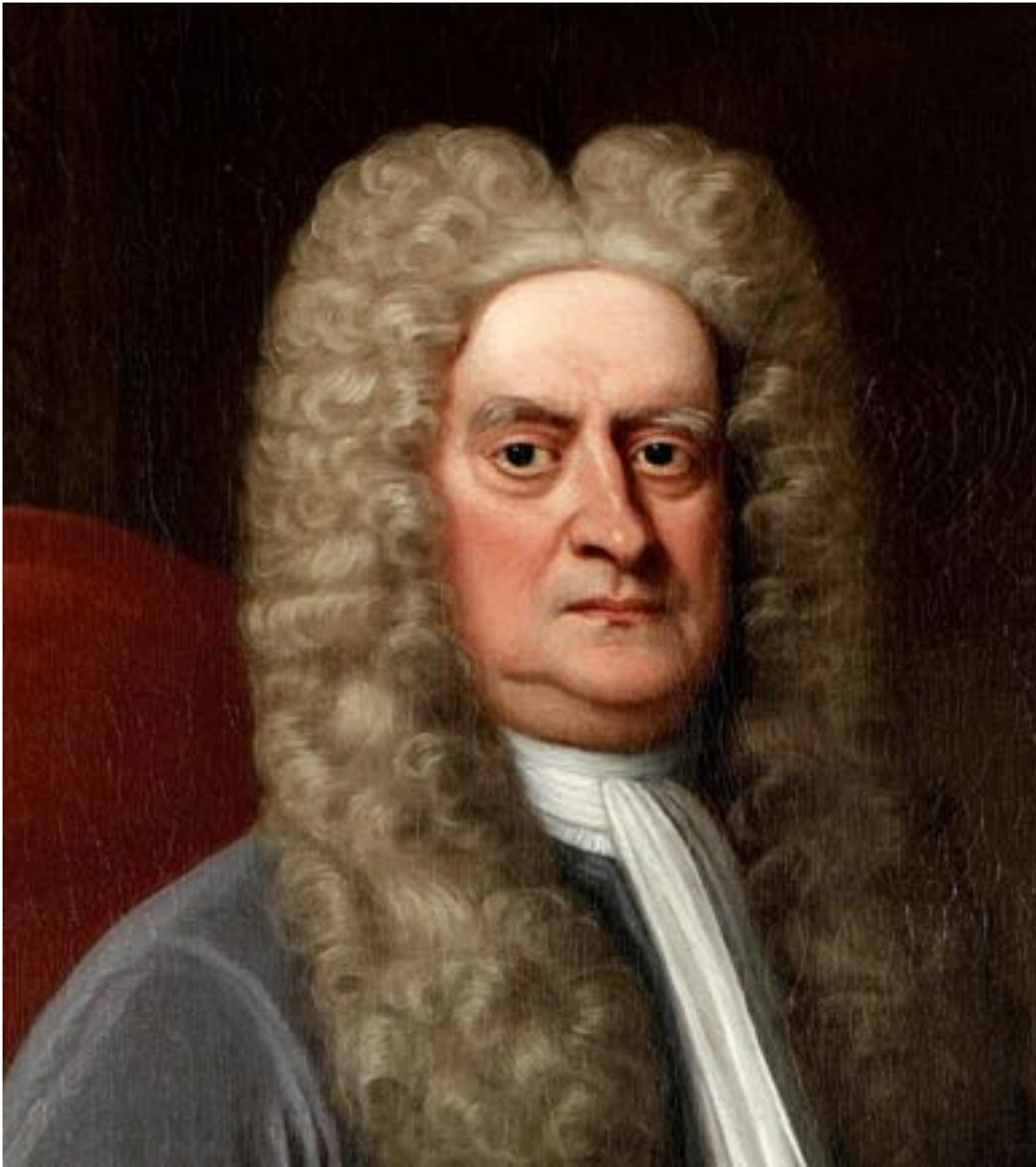
Who is this man?



Sir Isaac Newton

1643 to 1727





Newton's 1st Law of Motion

“Every object continues in a state of rest, or in a state of motion, in a straight line, at a constant speed, unless it is **compelled to change** that state by forces exerted upon it.”



You = The Outside

FORCE

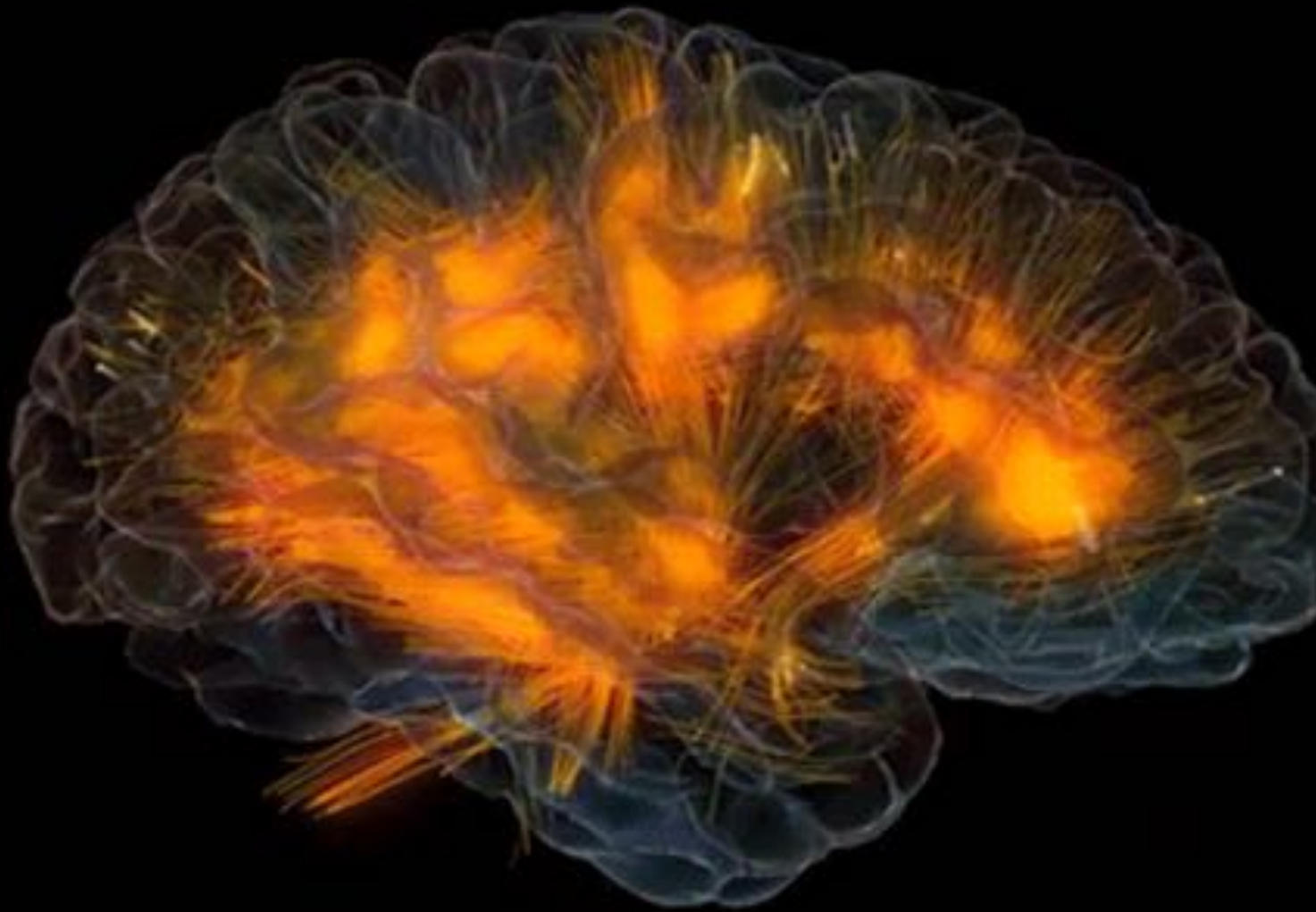


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Antonio Damasio, Neuroscientist



A close-up photograph of a hand with the index finger pointing towards a bright, glowing blue light source. The background is dark and out of focus, with some blurred light streaks. The word 'compelling' is overlaid in white text on a dark blue horizontal band at the top of the image.

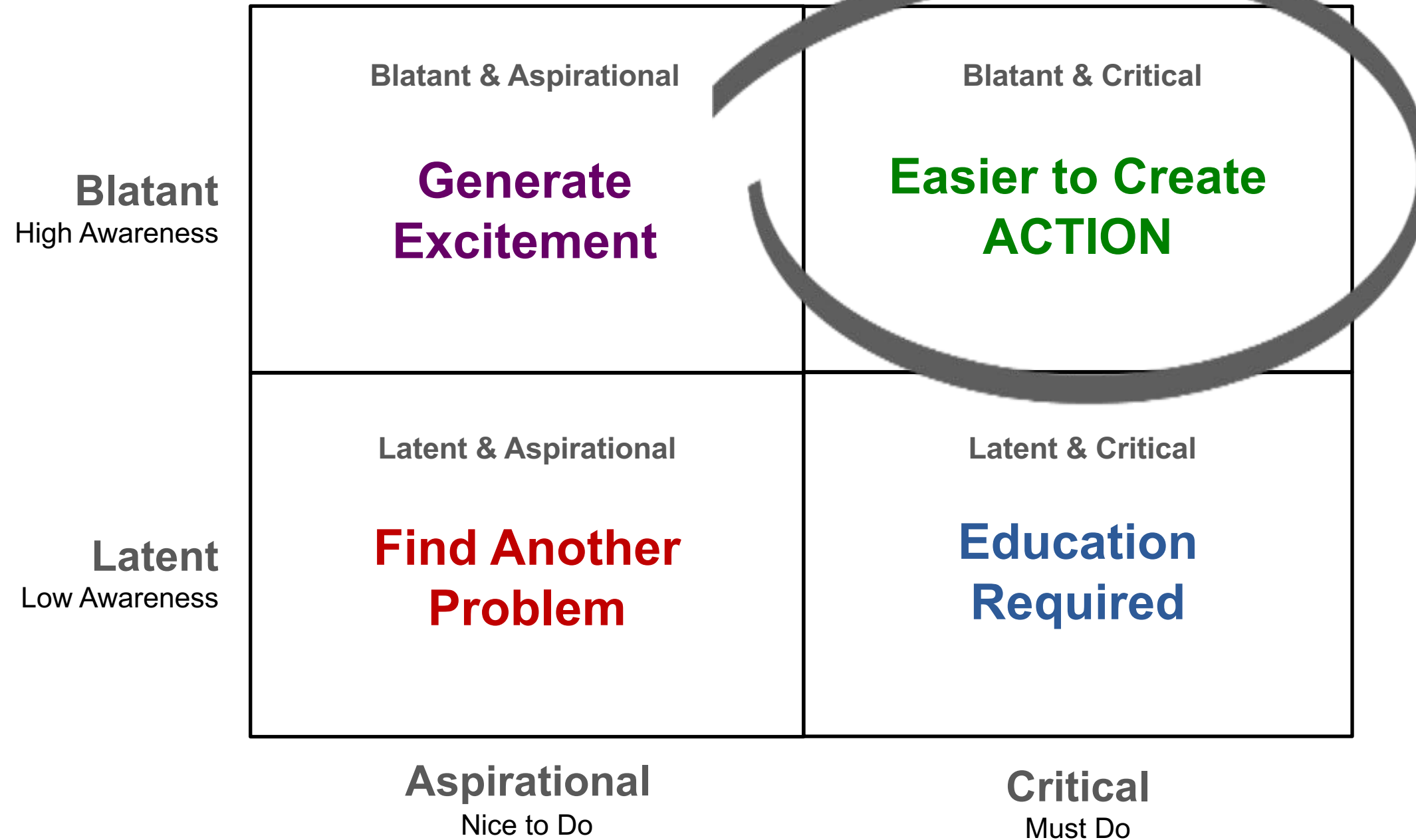
compelling

How Do You
Strike an
Emotional
Response
that Leads
to Action?

The background of the slide is a vibrant collage of numerous arrows in various colors including orange, green, purple, yellow, red, pink, blue, and light blue. The arrows are of different sizes and are oriented in many different directions, creating a sense of dynamic movement and multiple paths. The text is centered over a lighter blue area in the middle of the image.

**Focus on
the Right
Problems**

Focus on the Right Problems





3 Important Questions

How is this situation *impacting* your company?

How is this situation *impacting* you?

What's the *impact* of doing nothing?



Creating Action Through **Clarity**

Promise to
Simplify the
Complicated



Your prospects won't tell
you if they are confused.

**They'll just
go away.**



Creating Action Through **Urgency**

Tie the Action
to a **Time Frame**

“What’s at risk if we do
nothing?”



Creating Action Through **Loss Aversion**

Fear of Loss or Missing
Out is More Powerful
than Chance for Gain



Loss Aversion

“Your clients are more sensitive to losses than gains of equal magnitude.

The magnitude of the emotional response to ***losing*** \$100 is greater than the magnitude of the emotional response to ***gaining*** \$100 (as much as 2:1).”

Preet Banerjee

Author of *Stop Overthinking Your Money* and
Financial Services Consultant



Questions?



Be Relevant or...

**Be
Ignored**



Be Compelling or...

Be
Forgotten



Knowledge is
Worthless

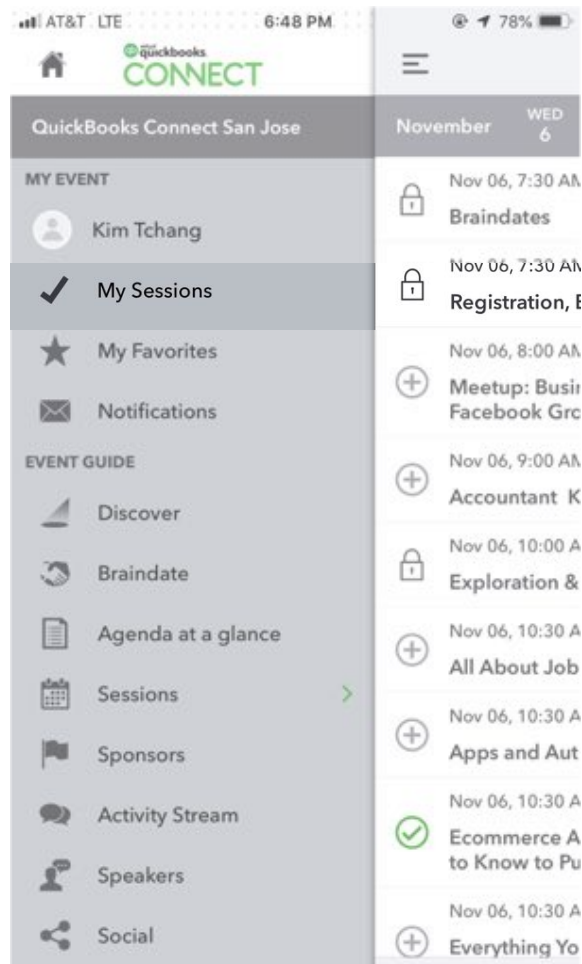


Time For *Action*

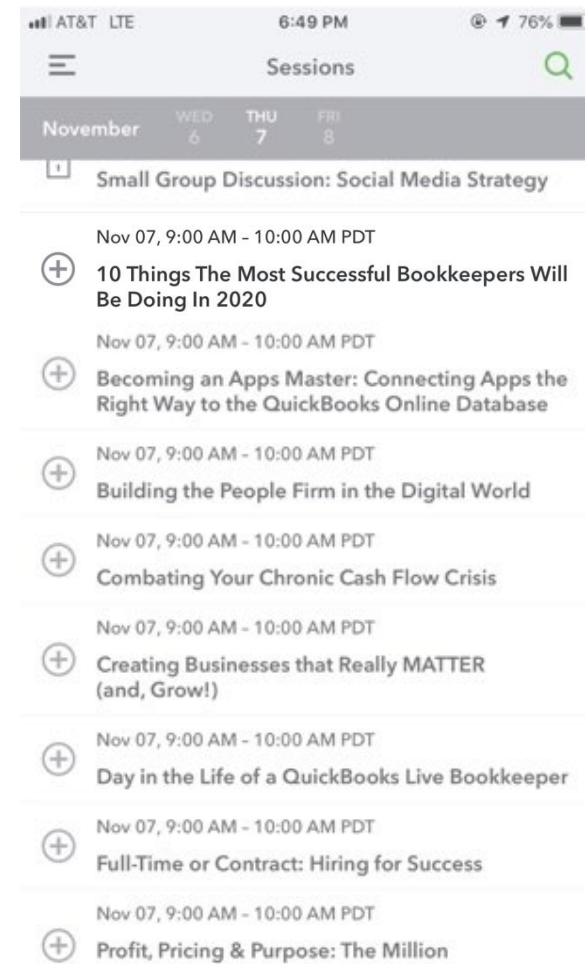
Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

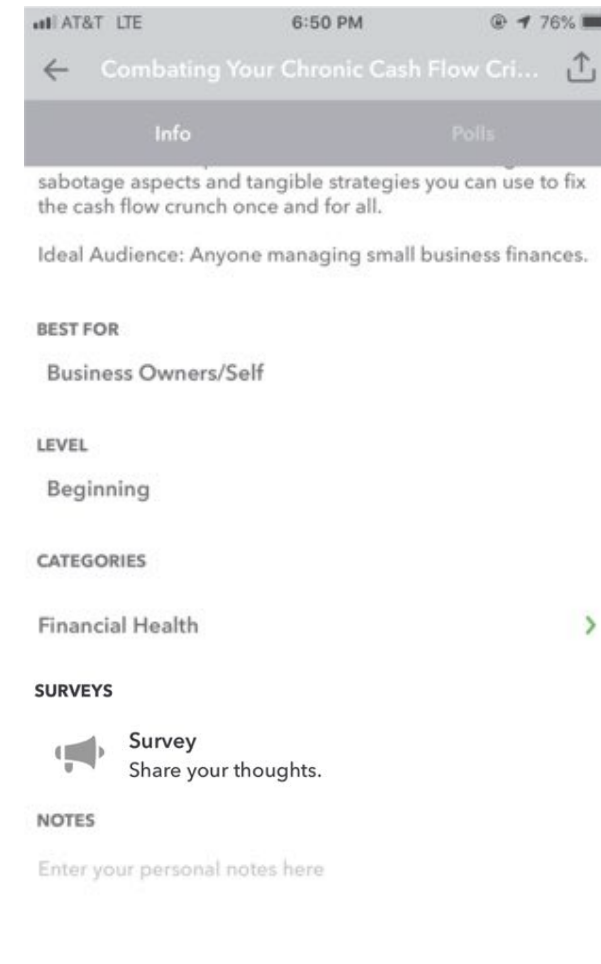
1. Select Sessions



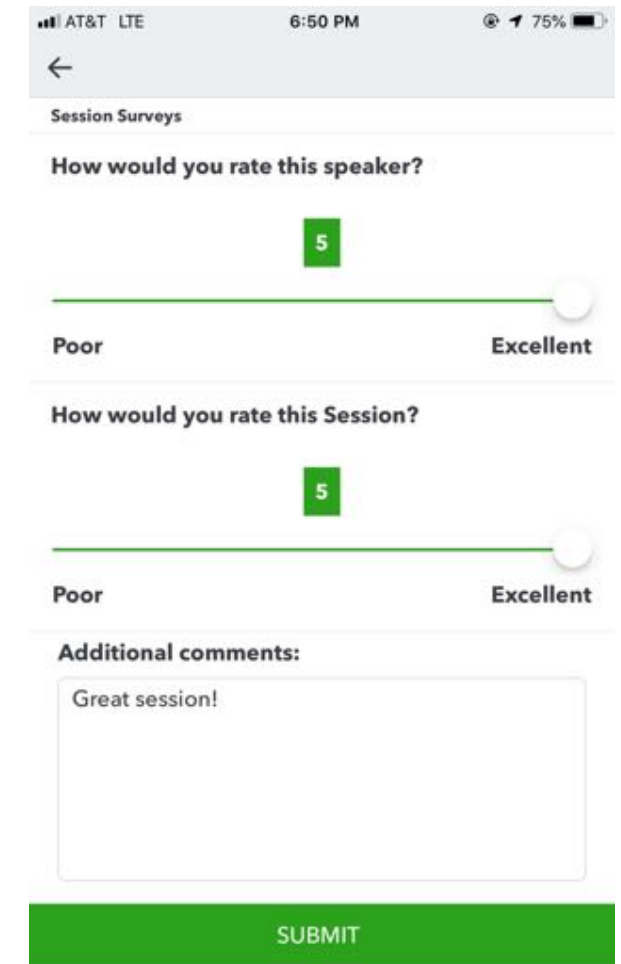
2. Select Session Title



3. Select Survey



4. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks CONNECT agenda page for November 7, Accountant Day. The page features a navigation bar with links for Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, and FAQ, along with a Register Now button. Below the navigation bar, there are tabs for November 6, November 7 (selected), and November 8. A search bar labeled "Search for sessions" is present. Below the search bar, there are filter buttons for Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, and Financial Health, with an "Expand all +" link. The agenda list shows sessions for November 7, 2023. The first session is "Registration, Breakfast & Exploration" from 7:30-8:00 am. The second session is "Braindates" from 7:30-10:30 am, which includes a description: "New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. [Learn more](#)". Below this, it says "Best for: All Audiences" and "CPE Hours: not eligible". The third session is "Yoga" from 8:00-8:30 am. The fourth session is "Breakout Sessions" from 8:00-8:45 am, which includes a list of sessions: "Small Business Meetup: Relationship Marketing and the Power of Human Connection", "Small Group Discussion: Social Media Strategy", "Small Group Discussion: Showing up - Why What You Wear Matters", and "Small Group Discussion: Build Your Dream Bookkeeping firm". Each session has a "+" icon to its right, indicating that more information can be viewed.



OWN
THE
FUTURE