Urgency Based Selling System

Theory and Practice



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What is Urgency Based Selling®?

Create Urgency

Imagine you are facing a sales crisis – to survive, you need to dislodge entrenched incumbent suppliers for a very competitive packaging product in a mature, or even declining, market. Andy Gole faced this crisis in the 1980's. To survive, he developed the core ideas of the Urgency Based Selling® system. He needed to act on a "do or die" basis and create a sense of urgency in the prospect – a compelling reason to act now. Since 1995, Andy has offered his winning formula to variety of companies and industries.

Do you feel impotent because the sales force doesn't create a sense of urgency, a compelling need to act now? The result is inadequate closing ratios and longer selling cycles.

Bear in mind - no urgency, no control over securing the order.

To implement Urgency Based Selling typically involves a 3 part paradigm shift:

- 1) Selling values from social selling to business selling
- 2) Method the standard sales call, to overcome the 3 fatal flaws in selling
- 3) Vision a bold vision to match the bold behavior.

The 3 fatal flaws are assumptions that undermine or destroy business development:

- 1. Assuming prospect enters conversation with serious intent they won't. Typically, the conversations are safe pricing exercises.
- 2. Assuming prospect believes what we say they don't.
- 3. Assuming prospect knows how to make a decision often they can't, particularly for the infrequent decision.

You need a powerful standard sales call to overcome the 3 fatal flaws.

As you read on, you will learn about the theory and practice of Urgency Based Selling.

Andy Gole

AUTHOR
CONSULTANT
STRATEGIC GROWTH CATALYST
SALES EDUCATOR AND PRACTITIONER
CREATOR OF - THE URGENCY BASED SELLING® SYSTEM



Andy Gole – is founder and president of Bombadil, LLC, started in 2004. His experience brings a unique blend of both the theoretical university professor and street wise practical sales warrior to sales training and consulting. Andy's work has helped senior leaders and business owners reenergize their sales efforts and sales teams, coaching changed behavior to engage their clients in serious conversations that leads to sales. His efforts aid companies make a paradigm shift in how they approach clients, as well as create behavioral change with their sales teams. Though he describes himself as a sales theorist, his approach, Urgency Based Selling® System is built upon over 4,000 direct sales engagements Andy has personally performed. Clients' expected outcomes include: 1) sales people doubling their closing ratio; 2) sales increases typically of 10-20%; 3) the client's selling becomes a defendable position – analysis shows even up to 6 years later, the competition can't emulated the process.

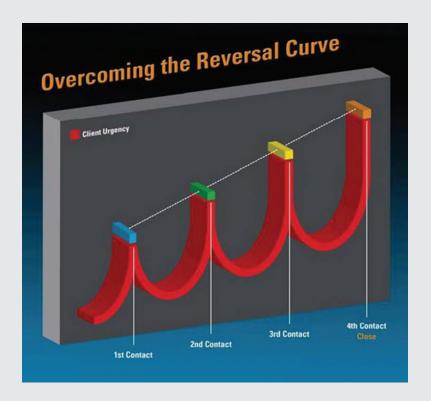
Andy started his career in sales in 1979, working for Brockway Glass (now Owens-Brockway) in pricing and long term planning. Success in corporate America held back his entrepreneurial spirit. This led Andy to launch his first company, a sales agency selling packaging to food packers. His next venture was developing and marketing a product sold to major retailers — including Target, Kmart and Wal-Mart. Finally in 1995, with inspiration from a CPA mentor, Andy founded his consulting business. In 2004, he founded Bombadil, to share his selling insights with the business community on a full time basis. He has authored numerous articles on the subject of sales, sales leadership and selling in a variety of challenging situations.

For 8 years, Andy served as an Adjunct Professor at Rothman Institute of Entrepreneurship at Fairleigh Dickinson University (NJ) teaching entrepreneurship and sales and sales management. Andy has a BA in Economics, Binghamton University and a MBA Marketing, NYU.

Examples of Andy's client results with his system are:

- Advertising Sales to Pharmaceutical Companies unit sales increased 55% in 1st year of program
- Market Research sold to Pharmaceutical Companies sales of key team members doubled in 2 years
- Packaging Sold to Major Cosmetic Companies Sales up 30% after 1 year
- Hotel Chain room blocks and catering sales up 20% after 2 years

Overcoming the Reversal Curve



We have all experienced the "reversal curve." You have a great sales call, the prospect loves you and swears "eternal fealty;" then, you can't get him back on the phone. The prospect seems to have forgotten you exist. How is this possible, after such a great sales call?

The reversal curve offers a strong explanation.

Take a look at the curve above. The 4 colored rectangles represent the 4 sales calls in a 4 call close. The process looks linear. Now consider the underlying curve.

After that 1st sales call (the blue rectangle), the prospect returns to other urgent matters and forgets we exist. He got along without us until today, probably can make it until tomorrow. We move "down the reversal curve." In many cases, the real battle in sales is the silent battle – the strategies and tactics that move us back up the reversal curve, to the 2nd sales call (the green rectangle).

Selling isn't typically linear, but overcoming a series of reversals.

The Urgency Based Selling® system teaches you how to overcome the "reversal curve" – offering both a solution and the change implementation process.

How Urgency Based Selling® makes a material difference:

- 1) Exponential sales growth even in declining markets
- 2) Solving the Purgatory of Call me Back in 2 weeks
- 3) Storming the Bastille
- 4) How Selling is like Texas Hold'em
- 5) Solving the 3 Fatal Flaws in the Selling Process
- 6) The Theory of the Glasses
- 7) Overcoming the Reversal Curve

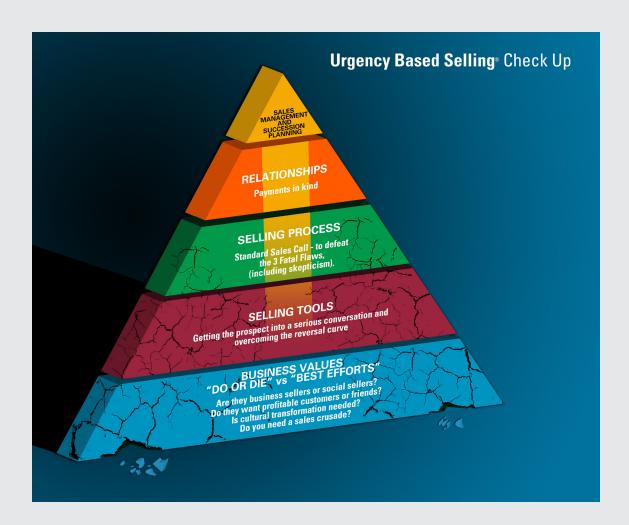
Thought Questions

- 1. Are you growing your sales fast enough?
- 2. Are you in safe or serious sales conversation?

Safe means you will never get a stick of business. Serious means you have a chance.

- 3. Are your sales team members more social sellers or business sellers? Do you want to change this?
- 4. Are you opening enough new accounts?
- 5. Are you selling profitably enough?
- 6. Are your sales team members getting WOW's from their sales presentations? Are they strong enough?
- 7. If you are getting WOW's, what are you harvesting?
- 8. Are you getting enough introductions?
- 9. Are you creating selling dilemmas for your competition?
- 10. What does your sales team do when the prospect says "I'm good"?
- 11. Are you having a challenge integrating different sales cultures?

Are Your Sales Foundations Solid or Crumbling?



Strong sales foundations include:

- 1) The right business values Do or Die vs. Best Efforts
- 2) Strong selling tools to get prospects into a serious conversation
- 3) Strong selling process to overcome the 3 Fatal Flaws

Why we need the hybrid entrepreneurial salesperson



There are not enough entrepreneurs to go around:

- DiSC profile only 20% of the population are entrepreneurs
- Their are 27 million small businesses
- Most entrepreneurs are engaged in small businesses

How Selling is Like Texas Hold'em



Don't Fold a Winning Hand!

Solving the 3 Fatal Flaws in B.D.





Assuming prospect enters conversation with serious intent – they don't.

Safe vs. serious conversations – basic distinction



Assuming prospect believes what we say – they don't.



Assuming prospect knows how to make a decision – often they can't, particularly for the infrequent decision

Theory of the Glasses



Will a prospect give us a project before all the glasses are full?

We need to smoke out and fill the glasses

Solving The Purgatory of: Call Me Back in 2 Weeks



Beware of Self Limiting Assumptions

Testimonials and Quotes

"When you seek a leader, you want someone competent, who doesn't need the job, who won't create a fiefdom. Someone who will do the job and get out."

"The proof is in the pudding; initial observations suggest participants are enjoying a 20-30% increase in sales. They are doing new sales behaviors and starting to think outside the box. This is what we wanted."

"Here are some of the things we've learned/done: Price conditioning offering a compelling package of materials to justify a higher opening price that could be negotiated to a better price than we are currently receiving for closed deals."

"This training helped to turn me from a relationship seller (with little control over the sales process) to a genuine salesperson. At the start I thought I had excellent selling skills only to find out that I had not even scratched the surface."

"We quickly went from a dysfunctional structure where sales people were repeating ineffective techniques and giving long useless reports at sales meetings to a highly focused, disciplined and effective team."

"You increased sales out of our Michigan plant to help extend the life of that plant for five years...You increased our sales more than 30%."

"Andy is a very bright and driven individual who challenges himself to perform at his peak level every bit as much as he challenges others to do the same."

"Despite having given you very little time to prepare, I was impressed by the energy and dedication with which you approached this assignment. I'm sure you know from the student evaluations that your students enjoyed the course."

"We were dissatisfied with our outside telemarketer. You helped us recruit new, lower cost telemarketers, then trained them so we actually got the job done--calls made, appointments set."

"You showed us an easy way for getting "engagement" with the prospect, which had an immediate positive impact on my getting more appointments and closing more sales."

"Your most innovative work was figuring out how to measure what makes us special."

"You pulled prospects into our booth who we would have missed including the largest player in the industry (2400 members), who became a client...I wish I had met you years ago."

"Thanks again for...moving us from an interest based selling method to an urgency based selling method. We are expecting to double our advertising sales to pharmaceuticals next year as a result of your methods."

The Business Newspaper for the Tax and Accounting Community NGTODAY

ACCOUNTING TODAY: JUNE 22-JULY 12, 1998

Gikow Bierman & Talesnick teaches clients art of the deal

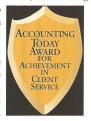
by John Fuller

Roseland, N.J. – Closing the deal. It's a phrase often identified with fast-talking salesmen that strikes fear into the hearts of some accountants.

Gikow, Bierman & Talesnick wanted to overcome their sales anxieties and so developed a sales training program with one of their clients. The program worked so well that they have been selling their expertise for a year-and-ahalf at an average of \$15,000 per program. The training consists of five classes, field observation and follow up. For their innovative thinking, the Roseland, N.J.-based firm received an Accounting Today Gold Medal Award for Achievement in Client Service.

The firm wanted to improve its sales closing statistics, but nothing

seemed to work. The sales gurus would come and go, but their advice was soon forgotten. Firm accountants wanted a cus-



tomized sales training program, and they discovered the solution was closer than they thought.

A client, Andy Gole, president of AMG Corp., convinced the firm that, although his successful sales record

was as a distributor and wholesaler of toys and novelty items, his sales methods were universal. Gole said that he could provide the training the firm needed.

Gole spent six months working with the partners, going out on sales calls and observing their selling techniques. He developed classroom training and had the accountants role play to deal with a series of customer objections. Gole built his sales technique around teaching sellers to overcome the customers' natural skepticism.

"Salespeople have conditions and be in control," Gole said.

"You have to earn the right to ask certain questions and have to know when to ask them. We also developed a routine on how to overcome objections."

Gole tailored his sales techniques to the needs of the firm and helped the CPAs become more at



to know the closing Burt Bierman, right, of Gikow, Bierman & Talesnick, and AMG Corp. president Andy Gole know how to make clients sign on the dotted line

ease with selling.

"Andy saw our sales technique and stayed with us," said partner Burt Bierman. "I think most accountants have a hard time closing, and Andy helped us develop closing questions that we were comfortable with."

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Gole's training worked. The firm's closing rate of new sales calls increased by 25 percent. Eventually, the firm decided to sell the training to accountants in other markets, but they weren't buying. They shifted the focus of their sales campaign to their clients.

"Everybody has clients that are on a level plane," Bierman said. "Their sales are stagnating and we thought these types of firms would be good candidates for our program." After three years of little growth, one client increased its sales by 11 percent a year after the training.

"The sales principles are the same," Bierman said.

The firm sees its sales management training as a way for clients to complete the planning cycle. If the sales people do not understand the plan the firm helps them generate, it is doomed to failure, he added.

The firm wanted to attack the commercial market with their sales program and thought banks could help them develop contacts. It turned out that the banks themselves were interested, leading to a contract with West Paterson, N.J.based Lakeview Savings.

Lakeview has 10 branches in Bergen and Passaic counties and wanted to convert from a thrift to a community bank. In January, they hired Bierman and Gole to train their managers. "We had to change the culture of the bank and become sales oriented," Lakeview Savings chief operating

officer Kevin McCloskey. "A community bank manager has to solicit business."

The bank has almost doubled its monthly equity loan average since applying the techniques taught by the firm. "The results have been measurable and we've been very pleased," said McCloskey.

McCloskey thinks that the training has made a lasting impact on his staff. "The culture here has changed," McCloskey said. "We're more confident and successful. It's hard to accept rejection, but part of the training is failing first and learning from your mistakes."

His staff committed themselves to practicing what they had learned, but something about the training surprised McCloskey.

"It was fun," he said.

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Steven Pinado, CEO 267.287.1070 spinado@membersolutions.com

January 29, 2008

Mr. Andy Gole Bombadil LLC POB 637 Martinsville, NJ 08836

Dear Andy,

I had a sense of personal regret, when your first assignment at MSI was completed last July, after 14 months. I valued the positive influence you had on our organization; but the job was done.

You left a very positive legacy - doubling our closing ratio, creating and systematizing our selling process, developing a sales management system, helping us integrate sales and marketing, and developing our trade show selling process.

When Member Solutions decided to diversify the enterprise side of the business, targeting larger corporate and franchise clients, I was glad to have an opportunity to invite you back.

In the month since you started your second assignment with us, I can already see big changes in our attitude and approach to and response from the market.

As you know I spent some of my career Salomon Brothers advising corporations on financial strategies, capital raising, and strategic transactions. I have also had the opportunity to work with several of the big-name management consulting firms.

There a few differences between these firms and Bombadil.

- Their presentation materials are much prettier
- They bring more people to meetings
- They charge at least four times as much
- They are less accountable for real results than you.

You provide consulting services and business insight at an affordable price. I value your helping us turn selling into a scalable core asset.

You can continue to rely on me as a satisfied and reference-ready client.

Regards,

Steven Pinado Chief Executive Officer

Member Solutions Inc. - 261 Old York Road - Suite A-51 - Jenkintown, PA 19046

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HOTELS UNLIMITED

November 16, 2010

Andy Gole Bombadil LLC POB 637 Martinsville, NJ 08836

Hi Andy,

When I witnessed you negotiating the \$1 million contract on our behalf, I told you I would write a testimonial for vou.

You had been devising negotiating strategies for us, for some time; I was concerned that our sales team was "watering down your approach" and giving away too much.

In the recent instance, for this material opportunity, we had bid 10% higher than the last time, when we lost the contract.

This time, our offer was improved by a number of recently implemented innovations you had suggested – the smile test, the quality book, the testimonial letters, the towel folding.

We were very pleased when the prospect told us we were one of two finalists, from a field of 6 contenders.

The prospect then told us we needed to work on our price. When you devised our strategy, I knew that no one in the company could implement better than you – to respectfully take a very strong stand.

I was in on that first negotiation, where the prospect told us we had a great chance of getting the contract, if we cut the price 10%. The way you put him on the defensive was amazing. You changed the dynamics of the conversation to a more level playing field.

I wish I was present for the 2^{nd} discussion, where you offered a 1 $\frac{1}{2}$ % price adjustment in return for a non-cash payment.

The buyer later told our sales manager that you are a very unusual person. I have to agree.

I wouldn't be writing this letter, if the story didn't have a happy ending. Today, we were awarded the contract.

Your negotiating and helping us win a huge contract was an unexpected dividend of our business relationship.

I would be glad to be a referral for you.

Carey Tajfel, President

Sincerély,

399 Monmouth Street, East Windsor, NJ 08520 Telephone: (609) 632-0006, ext. 502 Fax: (609) 426-1313



Andy Gole, President Bombadil LLC POB 637 Martinsville, NJ 08836

April 8th, 2010

Hi Andy,

The other day you asked me for some feedback on your program to date....

When my lawyer suggested I attend your September, 2009 seminar, I had high expectations, but no clear concept of what you could do. After the seminar, I was sufficiently intrigued to invite you to visit – to discuss our selling and sales management challenges. I found you quirky (and not for the last time) in asking me to fill out a survey **before** you would visit. This was rather non-conventional but I was intrigued, so I had my whole team complete the survey.

We had a great meeting at our office, the seminar you delivered to my brother (partner) and executive team was compelling. As a result, my brother and I came back to see your December, 2009 public seminar, for another look at you - and were even more impressed. So we reasonably (from our perspective) asked for a proposal. We found it quirky that you wanted us to check references – **first**. It took me a month or so to do the reference checks; you were patient, waiting til our sense of urgency was there. But you stayed in touch, sending me compelling ideas, that let me explore my sense of urgency, and test if your Urgency Based Selling® and personal consulting were the answer. We decided you were the answer. We hired you with high expectations, but an imprecise concept of the process and outcome.

You told us the Phase 1 discovery process would take 4-6 weeks; that you would study our business – hotel room and catering sales – and in week 2-3 you would start "writing." You said you couldn't predict when your creative process would engage. We had high expectations, but....

By the 2nd week, you started sending us a copy of ideas to consider. There was some value, but nothing that exciting. I began to wonder...

Then, in the 3rd week, a torrent of extraordinary creative ideas started flowing. We were overwhelmed and extremely pleased. We have been in the hotel business for over 20 years; you had the assignment for 4 weeks..... We found your creative messaging and repackaging of our brand, and the new ideas for customer satisfaction, to be very exciting. In effect, you developed entire advertising campaigns for both sides of our business. We quickly approved your "brainstorming book" to move to phase 2, the actual training.

You wisely found the "innovators" in our team – at both the sales and GM level, during Phase 1. You experimented implementing new ideas with these innovators and were ready to share successful results at your first seminar.

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I had high expectations, but....

It was a good thing you cautioned us about the difficulty of the change process. You told us it is akin to a "sex change" for the entire team and boy were you right. That team members (at both the sales and GM level) needed to hear the message repeatedly to begin changing. My brother and I are very impatient, and your counsel: "today is the first day of the rest of our lives" and "let's not bring any ghosts forward" was extremely valuable.

Your design and implementation of the "1 to 1" sessions with sales team members and GM's took our management and team development to a new high level.

By the 3rd week, we were beginning to see material changes and evidence the program is working on a broad scale. My brother and I were very concerned from the outset about proving causation – that the sales team was originating and creating sales, vs. just handling leads generated by the brand. You showed us how to do this, an idea we have incorporated into our compensation plan.

Your work in training the GMs to be sales managers has been very impressive. We value your assistance with leadership development, showing the GMs how to coach and develop the sales team. We expect to have some losses in our sales team. We see this as good, if the sales team chooses to be non-compliant. We are thrilled to see turnaround in a couple of team members we thought were "lost".

On top of all this, we love your: HR recruiting system, sales management system, your valuable advice in how we consider adding positions or blending responsibilities to make our managers more effective and challenging our philosophies to make us "think" of better strategic ways to run our company. Overall, you have largely restructured our business because of your talent and the fresh pair of eyes and energy that you have approached this assignment with. You bill yourself as a sales consultant and trainer, but if you would take some advice, I would hang out another shingle – you restructure businesses.

Did I mention your work ethic? I find your commitment to the success of my business to be breathtaking. The hours you work are unbelievable and even approach my own which I rarely come across.

Your program is titled Urgency Based Selling which is consistent with how my brother and I treat all aspects of what we have on our plate each and every day – with Urgency.

As a result of your program, my brother and I are both excited by our business, as we haven't been in years.

We look forward to a long association.

I would be glad to be a reference.

Sincerely,

Carey Tajfel, President

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April 26, 2010

Mr. Andy Gole President Bombardi LLC P.O. Box 637 Martinsville, NJ 08836

Dear Mr. Gole,

I had the pleasure of meeting you less than 3 months ago, when my company Hotels Unlimited Inc. hired you to work with us to increase sales in a changed market condition.

In this short time, I can't tell you how appreciative I am of the sales education you have provided to me thus far. You have made me a more confident sales person with the ideas and the tools you have provided me. By implementing your sales tools and selling techniques – including: moxie, being a business seller vs. a social seller, using PIK's, selling the urgency - I have increased my closing ratio. I have increased long term clients with over 200 room nights rates by 10%! By setting up appointments, getting more site tours and storming the Bastile, my sales potential is endless!!

You have personally spent hours with me to discuss my personal sales questions and challenges which were above and beyond what you were hired to do. I can assure you your time was not wasted. I have been successful thus far in closing most of my deals that I had challenges with. You have taught me to sell on an urgency basis which in today's economy is needed.

I wanted to mention 2 situations in particular:

- 1) "Hotel rooms are all the same; my people can sleep in a closet; what's your best price?" This prospect wouldn't take me seriously until I challenged her "I'm surprised to hear you say that", and sold her on next day productivity vs. rate. I convinced this prospect to bring us about 50 room nights, and pay us 35% more than the rate she was getting at a competitor.
- 2) The price increase we had to increase a rate to an existing customer. I was very nervous. In the "old days" I would have sent an email announcing the increase and hope we kept the business. You coached me on how to visit and sell the increase. It worked! I was amazed!

The best part is we are half way through the program! I can't wait to learn more. I have been with the company 7 years and I am honored to have you part of our team!

Yours in Hospitality,

Debbie Pizzola

Director of Sales

 $Official\ Sponsor\ of\ the\ U.S.\ Olympic\ Team$

The Hilton Family

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June 25, 2010

Mr. Andy Gole

President

Bombardi, LLC

P.O. Box 637

Martinsville, NJ 08836

Dear Mr. Gole,

I would like start out by saying thank you and what a pleasure it is to have the opportunity to work with someone who is so "out of the box". Your philosophy of "Business Values vs. Social Values" has helped us tremendously. For example; Debbie, Director of Sales and I, General Manager, landed a very large account over 300 room nights by using "Moxie". Before we met Andy, I would have never went to this company without an appointment, with Security guards with guns and could not get past the gate, by Andy's moxie and Storming the Bastille and thinking out of the box, we were able get one of the guards to call the key decision maker. My Director of Sales was speaking with the Decision maker while were still at the gate and we were able to set up a site tour. The site tour happened and he was very happy with the hotel and will be signing a contract with us.

As a General Manager, I have learned through Mr. Gole's programs how to be a Sales Manager as well, this has helped me with knowing everything that is going on with prospects. For example; we had a bank that wanted to book a meeting with us and was giving Debbie the run around, I stepped in and sent them a GM letter, she called me and thanked me for the letter. I asked her "what do we need to do to make this happen" we discussed some arrangements and we received a signed contract.

The tools that you have provided us; splash sheets, smile test, scorecard, freebies and many more have been very useful and helped us in closing accounts.

And lastly my relationship with my Director of Sales has grown so much, we are communicating several times a day. I am getting more involved in sales, which is helping us achieve our revenue goals.

I will speak for myself as well as my Director of Sales, Debbie; we enjoy the seminars, and appreciate all the help you have given us. You always return calls immediately as well as emails when we need help. I am very glad my company has invested in your program.

Again, thank you so much for the opportunity to work with you.

Regards,

Darlene-Mucardo

General Manager

Hilton Garden Inn Lakewood, NJ



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Andy Gole Bombadil LLC PO Box 637 Martinsville, NJ 08836

To Whom It May Concern:

Using Andy Gole's "urgency" based selling system was instrumental in my recent success of surpassing a sales person who has been with *Campaigns & Elections* magazine for over a decade. It was expected that I would take two years to achieve the level of business my coworker had developed over his many years. I've reached it in a year.

The training I've attended is for a sister company that deals with the pharmaceutical industry. I mention this because my magazine and audience differs entirely from my sister publication. Andy's theory is strong enough that it translates universally.

My unique perspective as an "outsider" allowed me to watch as Andy recreated the entire sales relationship with the Intellisphere to help them achieve a 77% increase in sales while the industry is down 5%.

Andy's technique is meant to train the sales professional on how to alter the current dynamic between sales and prospect through invoking mutual respect and "thinking minutes". The process is essentially a logical argument designed to bring the prospect to a single conclusion, they are bleeding and you have the cure.

Andy asks a great deal of his clients, but the simple fact is that he delivers what he promises.

Tim Teehan

National Sales Director Campaigns & Elections Magazine 1655 N. Fort Meyer Drive

Arlington, VA 22209

202.468.4112

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Joseph Galea, President 267.287.1129 joe@membersolutions.com

April 2, 2012

Andy Gole Bombadil LLC POB 637 Martinsville, NJ 08836

RE: Training new hires

Hi Andy,

I appreciate your working with Member Solutions to solve the problem of economically training new hires for the sales team.

Since 2006, you have helped me solve a number of sales and sales management related challenges. We have accomplished a lot together, here's what's on my list!

- 1) Developing our:
 - a) Selling system tailoring Urgency Based Selling® to our market
 - b) Core messaging
 - c) Proving materials (very powerful!)
- 2) Training 3 teams of salespeople
- 3) Coaching our sales management
- 4) Helping us improve Salesforce.com to reflect the metrics of your system
- 5) Developing our trade show strategy and working the Las Vegas Super show twice

One problem we still had was to cost effectively training new salespeople? It was hard to justify sales training cost for one person, leaving me to attempt to train our new folks with the same effectiveness as you. And even if that was possible, there's the opportunity cost of what I could be doing with my time. The solution of recording your series of seminars when we added several new folks to our team has been very effective!

Now, new hires take the Andy Gole sales course, listening to the seminars and watching the customized PowerPoint sequence. We found that we were still able to take people (with interest in selling) with little or no sales experience and get them ready for strategic selling within 30 days. As you know, we then plug the new hires into our monthly meetings where you and I discuss new strategies and overcome challenges together.

I thought that this might be useful for your other clients with a similar challenge and my story could help. Thanks again for all your help.

Regards,

Yoe Galea, President

Member Solutions Inc. 261 Old York Road Suite A-51 Jenkintown, PA 19046

www.membersolutions.com P 800-277-4407 F 267-287-1100 Building your business one member at a time."



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E-Mail: sales@wwpinc.com Web Site: http://www.wwpinc.com

July 12, 2011

Andy Gole Bombadil LLC POB 637 Martinsville, NJ 08836

Hi Andy,

In the 40 years I have owned and operated businesses, I haven't been a big fan of testimonial letters. When I invited you to help us improve our selling process and sales management for our 11 salespeople and 2 sales executives, I knew you endorsed testimonial letters – I just considered it a nice "extra" to the program. We never had testimonial letters and have more than doubled WWP in recent years, without them.

As you helped us, and the testimonial letters started coming in – including one from Mary Kay early on – I started to take notice. When the Merck testimonial letter came in – maybe the 7th one - when I saw how you used the Merck letter to shift a safe conversation to serious at HBA, you made me a believer. I witnessed how the letters can catalyze relationship formation – addressing the decision-making needs of the skeptic.

So I'm ready to put my oar in the water and give you an interim 3 month report about your impact at WWP. Here are some changes I like:

1) New Business Development Sales Calls - team members are making more calls

Some sales team members - successful with their current book of business - haven't made sales calls in years; several are now making new business development calls. We have millions of dollars of new opportunity in the pipeline.

- 2) Seminars every 2 weeks, to teach us your theory and show case histories of team members successfully implementing it. I particularly like:
 - a) the early indications that sales team members are helping each other with introductions
 - the assignments and the accountability starting with agendas and follow up memos after sales calls

I was always worried that sales training would be "canned". Your seminars are so customized that the 1 ½ hour seminar goes by without notice – we are hearing about vital opportunities and problems and how to solve them.

3) Helping the sales team sell with moxie

You warned me it would take months to coach sales team members to a more effective value system – adding business values to social selling. Your concept of using stronger language – e.g. "You must visit us at the trade show, to see our revolutionary changes" - was a big part of the recent successful show you worked with us. We virtually "sold out" our conference room and had about twice the number of appointments as last year, despite reduced attendance.

4) 1 to 1 meetings every 2 weeks, with each salesperson and a VP Sales, which offer a forum to:

- a) Customize and apply the theory to each team member's opportunities and personality
- Give sales team members more consistent access to Top management, and a forum for airing problems that need solving
- c) Hold the sales team accountable; between the process and the accountability, the sales process once a big black box is becoming a transparent process
- d) Identify a variety of problems that stayed hidden, when we only focused on year to date and year over year sales
- e) Target the new business opportunities the team will pursue
- f) Teach leadership skills to the VP Sales

5) The management meetings - we have had more in 3 months, than 3 years, which:

- a) Include discussion and action on problems/opportunities identified in the 1 to 1's
- b) Are helping me delegate more and more to my leadership team
- Have fomented better brainstorming to support key decisions and better buy in from the management team.
- d) Set priority targets for new business development

Related Note: The process allows flaws in the management responsibility roles to surface. This gives me the opportunity to realign those responsibilities to better manage the areas where additional supervision is necessary.

6) Overall control systems:

- a) There is greater accountability, as sales team members learn and apply your standard sales call. They are moving from treating leads and customers as private property, to taking responsibility for company opportunities that must be managed to minimize the selling cycle and maximize profitability – moving a commodity to a consultative relationship with customer.
- b) The pipeline reports are giving me leading indicators I didn't have in the past.
- c) The CEO letter you drafted in support of the sales process is giving management greater visibility with prospects and customers.
- d) The combined impact of the 1 to 1's and management meetings is giving management greater involvement with the sales team

7) Your overall change process which included:

- a) Studying the company for 2 months
- b) Writing the "book", with 2 rounds of comments by the top management
- Advising me in advance of: the process benchmarks, the resistance we would face, how and when I would need to intervene to move things forward

Your participation for 2 days of meetings with our overseas partner was a big plus; particularly when their owner pulled you into the conversation (through their interpreter) and asked you to help solve some of our challenges.

Finally, I appreciate the coaching you have given me, which provides me with new options to solve thorny problems.

I am glad we went ahead and invited you to help design and implement the change process. I would be glad to be a reference for you.

Sincerely,

Barry Freda, CEO



January 29, 2010

Andy Gole Bombadil LLC POB 637 Martinsville, NJ 08836

Dear Andy.

When we first met, you may have seen me as a bit cocky, a bit resistant to change. I was having very strong success, in a tough business- selling market research to pharmaceutical companies. Hell, I was selling \$25,000 a week on average and that was \$5,000 a day.

I remember challenging you almost every week in your sales seminars, telling you how I did things, when you introduced new ideas. You would patiently remind me that our focus should be on accounts I wasn't closing — which would require new methods. I kept on telling you I didn't have the time. I'm a 24/7 kind of person. I didn't have the time to try new things. I had a system that worked; I needed to keep on doing the system.

Finally, you "sold me a vision" that excited me – doubling my sales. You convinced me I couldn't put in more time, so I had to be more strategic with my selling time. Use advanced techniques to close more deals, bigger deals. You got me to experiment at the margin – with "nothing to lose" situations. The initial experiments worked. So I did more and more of the program. The more I worked the system, the easier it was to spot clients who were not as interested in buying from me as getting a third quote. Once I could spot those "suspects", my belief was that these were the people that I really needed to put through the system and one by one I started to close these harder/larger projects.

Soon I became your biggest supporter. Since my memory is not what it used to be, I have your "standard sales call" enlarged on my wall. As I talk to clients, I reconfirm where I am in the process, what's the next move. (But I still challenged you in sales seminars.)

And the results – in 2009, a year when market research sales were down 20-30%, my sales were up 70%. This was a remarkable experience. After closing an average of \$100,000 a week over the second half of 2009, I decided that my goals for 2010 would be to try to accomplish that weekly goal for an entire year. I will keep you posted on my progress but I was able to do it the first three of four weeks in January so far (that damn first week of the year!!).

I would be glad to be a reference for you.

Jeff Chase

Regards.

Director, New Business Development

400 Lanidex Plaza • Parsippany, New Jersey • 07054 • 973-240-1200 • 973-240-1220 (fax)



August 27, 2009

Mr. Andy Gole Bombadil LLC POB 637 Martinsville, NJ 08836

Dear Andy:

I wanted to give you some feedback on your sales consulting work – 1 year later.

For 30 years, my entire business has been systems and procedures driven, except for the sales function. A major reason I brought you in was: the promise you could do the same in sales. I was skeptical at the outset; I am a skeptic no longer.

The proof is in the pudding. We did a benchmarking study, where 2 salespeople completely embraced your sales system, while another only partially embraced it. We did the study in a time frame when demand for our market research was down 30%.

Those embracing your system had a 50% increase in sales, as compared to the same period in the previous year. The one holdout (now a believer and embracing the system) initially was off 50% in sales.

This salesperson would comment that market demand was off substantially. But when confronted with peers having a 50% increase, this salesperson got on the program and sales have now increased materially. What a difference your system makes!

Your focus on mining referrals has been essential to our success. As you say, certain team members were tripping over their "social values." We needed them to act like businesspeople. Your training program helped the team revise their business value system.

Your latest innovation is phenomenal. The 1 to 1 personal coaching after the group seminars is radically accelerating the rate of positive change.

I am amazed and pleased at how you have always faced the resistance and flack from the sales team, respectfully answered sales team member's concerns, and persuaded them (with some help from my backing you) to radically modify behavior.

I might add that your caring about people was always very important to me. Further, you take full responsibility, offering a turnkey program.

After 1 year, we took a break in your seminars; since we don't have a sales manager, I found we needed to invite you back in, within 2 months.

You have completely changed my view of selling and salespeople for the better - salespeople are heroes!

I would be glad to be a reference.

Marianne Storken

Best Regards,

Marianne Stephen

President

400 Lanidex Plaza • Parsippany, New Jersey • 07054 • 973-240-1200 • 973-240-1220 (fax)





March 11, 2010

Mr. Andy Gole Bombadil LLC POB 637 Martinsville, NJ 08836

Hi Andy,

Time pacing! All your work comes down to one concept for me - time pacing – making the sale happen a lot faster.

I had no sense as to how fast we could create and activate referral relationships for our high limit Lloyds of London disability. I was encumbered by self-limiting assumptions.

I remember hesitating to invite you in, for months, because I wasn't sure if I needed marketing or sales. You told me I needed both, that you did both, and you were right.

What decided me was the test seminar: I brought you in to work with my team. When I saw how they responded, I knew we had a fit.

Little did I realize the incredible impact your marketing campaign would have - the "Emperor's New Clothes".

Your Phase 1 study of our business and creating the brainstorming book is a major time pacing accomplishment in itself. You had no experience in our space and you were ready to "launch" in 6 weeks.

We jumped on the opportunity at the International Forum trade show, to use your new marketing materials and selling methods. It was like shooting fish in a barrel. We probably obtained 3 times the number of qualified leads. Time Pacing!

We also field tested the selling method, used the trade show as a kickoff.

By the time we started your formal seminars, the team was presold based on the trade show success.

I am amazed at how fast you have changed the culture in my business from a "best efforts" approach to a radical "do or die" approach.

It's all time pacing.

I would be glad to be a reference.

Best regards,

Edward Tafaro

Chief Executive Officer



(Ph) 201.512.0110 • (Fax) 201.512.0221



June 8, 2010

Andy Gole Bombadil LLC POB 637 Martinsville, NJ 08836

Hi Andy,

Thank you from the bottom of my heart. As you know, I'm a 26 year old business development advisor for Exceptional Risk Advisors with a strong passion for sales and a dream to one day own my own business. Currently, the main function of my role at ERA is to "hunt elephants" and develop strong marketing programs to aid in the growth of new business sales. The hardest part of my job before learning your system was hands down, without a doubt, equalizing the "elephants" perceptions of my professionalism, expertise, and ability to develop meaningful recurring revenue streams for their practice. Let me explain.

Exceptional Risk caters to the country's most sophisticated insurance advisors, the elite advisors working with Celebrities, Athletes, Entertainers, and incredibly successful business owners and professionals - our industry's so called "elephants." These advisors have children who are my age, and needless to say, have been in the industry longer than 26 years. When attending tradeshows prior to learning your system, we would drive traffic to our booth with give-aways that would produced around 50 leads. Of those leads, only around 7 advisors had clients that fit our niche since we were talking about free iPods and not business.

Working with you to create our "Emperor's New Clothes" campaign taught me one of the strongest lessons I have learned since I started my career in sales - the need to incorporate a paradigm shift mechanism into an introduction to stun prospects and control first impressions. The paradigm shift leverages our control over our prospects' inner monologues, allowing us to equalize conversations, change advisors' perceptions, and provide memorable experiences in an otherwise unmemorable event. Not to mention, we had a blast with an otherwise stiff crowd by asking fun, open ended, leading questions like, "Do you think it's possible?"

Using our new strategy proved to be incredibly successful at The International Forum. At a show where we typically collect 7 to 9 leads with true potential, we collected more than 40 leads from qualified prospects that were intrigued to work with us. By removing the give-away from our booth, we no longer need to waste our time speaking with advisors that want to win an iPod, rather than have a serious conversation about where they want to see their practice in 3 years. In a process that used to take 6 months, using the program we are for the first time converting leads in 2 to 3 months.

For all of your skeptics out there, keep pushing them to use their moxie and make radical changes! Your program works, it's a ton of fun, and I would be honored to be a referral for your system anytime you have a skeptic scared to take that first step. Thank you, thank you, thank you for fast tracking my success in sales. As a future business owner, It means more to me than you can imagine.

Sean McNiff

Exceptional GOLISMS

You get ZERO% of everything you don't ask for!

I will make sure that I sell with **Business values over Social values**.

I will do my best to turn safe conversations into serious ones.

I will use MOXIE when the right situation presents itself and make sure that I stay in a **do or die** approach.

I will ask GREAT Questions and be totally focused on the Advisor I am speaking with.

I will ask for PIK's and REFERRALS without hesitation.

I will sharpen my storytelling skills and master our elevator pitch!

Nothing happens without process and follow-up – I will commit to this process.

I will accomplish all this by finding out what their urgent need is and using our material differences to match those needs.





A DIVISION OF FARBEST-TALLMAN FOODS CORPORATION

March 25, 2010

Mr. Andy Gole Bombadil LLC POB 637 Martinsville, NJ 08836

Dear Andy,

Brent and I want to again thank you for the Terrific "Do or Die" sales training you presented to us and our sales staff on February 17, 2010. We both agreed that you kept the meeting lively and entertaining while at the same time there was continuous sales training being presented.

It has only been a month but both of us agree that we have seen a change, for the better, within our staff. The group seems much more energized and has much more of a sense of urgency! Also, as managers we learned a lot of new things and have modified some of our managing techniques.

The new vocabulary of Material difference, PIK's, Safe to Serious and others, has become part of our everyday language. Since the Training Seminar, we have developed some written material differences and have already used them at Conventions and presented them to new Prospects whenever necessary and they have been favorably received.

The basic rule of Sales is you can never sit back on your heels. Prospecting and bringing in new business is the key to success and we feel strongly that your method of "Do or Die" sales will help us get closer to our goals!

Respectfully

Paul J. Guzman Vice President

Regional Office Suite 222 • 5500 Bolsa Avenue • Huntington Beach, CA 92649 • (714) 897-7199 • Telefax (714) 898-8410

PARETTE SOMJEN



29 May 2009

Mr. Andy Gole Bombadil, LLC P.O. Box 637 Martinsville, NJ 08836

Dear Andy,

Since the formation of our company in 1988, we at Parette Somjen Architects have excelled at providing Architectural Services to a variety of markets and client types. The core of those being the Corporate, Educational and Municipal Sectors; equally important is our attention to customer service and delivery of our commitments. Because of our consistency in delivering quality architectural projects on or under budget, we continually receive not only repeat work but referrals from our clients. This is how our firm has grown over the past twenty years.

As a professional service organization grows, as ours has, referrals alone cannot sustain that growth. As with many things we have grown to realize the importance of business development / sales. It didn't seem so rosy over a year ago, when we set out on our quest to find a sales consultant and trainer. After interviewing more then one half dozen, I came to realize these individuals where more "entrepreneurs" then sales consultants. Transplants from the business world, they bought franchises which were "in a box" systems and expected us to fit that system. This was of little interest to our organization.

Being creative and innovative problem solvers, the concept of "sales" can be stifling. One of the most appealing things to my partners was the "quest" that you wanted to take us on. As creative individuals this was something that our group was able to embrace. No other consultant with whom we spoke ever used these terms.

In January, we finally decided we needed someone and more specifically, we needed you. We checked your references, attended your public seminars, considered the logic of theory, debated ad infinitum; and then, at our annual partners' retreat; we decided to pull the trigger.

Our organization has created exceptional systems that allow us to run a successful Architectural practice and business. Our lack of experience in sales was the one area needing attention. Every week you teach us practical techniques to solve real world selling problems. Your PIK's have revolutionized our practice. Battle plans, yin moves, the theory of the glasses, challenging the prospect - sometimes we get dizzy at the array of ideas you bring us. However, your program is the best "change process" we have undertaken in a long time. We look forward to working with you for a long time and continuing to be challenged.

I would be glad to be a reference.

Principals

Marc R. Parette, A.I.A., P.P. Gregory J. Somjen, A.I.A.

> Partners John Carton, A.I.A.* Stephen D. Ouick, A.I.A.

Associates Edward Neighbour, A.I.A. Joseph Pjura, A.I.A.*

> 439 Route 46 East Rockaway, NJ 07866 Tel. 973.586.2400 Fax. 973.586.240I www.planetPSA.com

> > *LEEDTMAP

Sincerely, PARETTE SOMJEN ARCHITECTS LLC



Gregory J Somjen, AIA By: Member

PARETTE SOMJEN



ARCHITECTS

Andy Gole Bombadil LLC POB 637 Martinsville, NJ

November 9th, 2011

RE: Almost 3 years later

Hi Andy,

It's been about 3 years since we invited you to help us with our business development (B.D.) effort. We both knew from the outset how unmanageable my partners and I could be. We also recognized how challenging a change processes like yours could be.

Nearly 3 years later, though we remain an unmanageable lot, we are happy you have taken this journey of continuous B.D. improvement with us – because we are substantially better at B.D.

We now have in place:

- 1) A process a standard sales call
- 2) Hard hitting messaging
- 3) An appreciation of our self-limiting assumptions in B.D and effective ways to overcome them
 - 4) Sales management tools

We like having you as our de facto VP Sales, helping us smoke out and overcome challenges in the B.D. process.

I enjoy the intelligent conversation and analysis that you bring to a subject which I once considered beneath contempt. I now see there are subtle depths to be plumbed in B.D.

Perhaps, most importantly, our bookings are up over 20% this year. I wouldn't say that you get full credit – the economy is better. But you helped us take advantage of the improved economy, as well as creating new opportunities to exploit.

One of my greatest satisfactions is how you continue to bringing us new ideas. After almost 3 years, one would think that you would run out of steam. Yet, almost every week, you bring us new ideas.

I Look forward to continuing the relationship.

Principals Marc R. Parette, A.I.A., P.P.* Gregory J. Somjen, A.I.A.

> Partners John Carton, A.I.A.* Stephen D. Quick, A.I.A.

Associates

Edward Neighbour, A.I.A. Joseph Pjura, A.I.A.*

> 439 Route 46 East Rockaway, NJ 07866 Tel. 973.586.2400 Fax. 973.586.2401 www.planetPSA.com

> > *LEEDTMAP

Sincerely

Marc Parette, Co-founder



May 19, 2008

PROFESSIONAL INSURANCE AGENTS

Andy Gole, President Bombadil LLC PO Box 637 Martinsville, NJ 08836

Dear Andy:

25 CHAMBERLAIN ST.
P. O. BOX 997
GLENMONT, NY 12077-0997
800/424-4244
FAX: 888/225-6935
WEB: www.pioonline.org
E-MAIL: pio@pioonline.org

I want to thank you for the terrific two-hour seminar you delivered on May 15 -- Sales Secrets You Can Apply to Every Day Life -- for the PIANJ Women's Business Forum.

Your idea of surveying participants, including agency owners, in advance to tailor the presentation hit the mark. In addition to the other topics in your program, the audience enjoyed the theme of motivating CSRs to "round the account."

You did a great job of moving the 38 attendees out of their "comfort zone," getting them to experiment with new approaches.

The first time you invited the group to role play, there was some hesitation. But soon, the attendees started going to work, following your direction, and before long there was a "roar" in the room.

I'll prepare a summary report of the evaluation results, but I can tell you now that they were almost unanimously "excellent" in their rating of your presentation!

I also appreciated how you made this a turnkey presentation – you took full responsibility for planning and delivering the talk.

Based on the positive response, we are looking to inviting you back for future training programs with PIANJ.

I would be glad to be a reference for you. Thank you again!

Sincerely,

Rosemary L. Goedtel Association Member Liaison

Evaluation Form

PIANJ Women's Business Forum Meeting May 15, 2008

Program: Sales Secrets You Can Apply to Everyday Life Conducted by: Andy Gole, Bombadil LLC

Category	Excellent	Good	Fair
Presentation of Subject Matter	14	3	
Knowledge of Subject Matter	16	1	
Enthusiasm/Attitude	12	5	
Speaker Response to Questions	17		
Professionalism	17		
Ability to Involve Participants	14	3	
Your Overall Rating of Speaker	13	4	
Your Overall Rating of Program	13	4	

What are the best usable ideas that you gained from this program?

- ✓ Urgency serious conversation.
- ✓ Urgency vs. relationship.
- ✓ How to draw out how a person feels.
- ✓ Using visuals to make a point; acknowledging internal dialog.
- ✓ Identifying the needs of the CSR and how to address change.
- ✓ Understanding the internal dialog and how to minimize it.
- ✓ Anticipate resistance, allow TIME for it for the process of persuasion.
- ✓ Strong relationships are important to succeed.
- ✓ Internal dialogue.
- ✓ To learn to respect others more.
- ✓ Focus on the urgency statement.
- ✓ How to fine-tune the resistance of employees.

How do you plan to apply these ideas in your business or personal life?

- ✓ To develop my team and to plan out conversations; stakeholders.
- ✓ Already use them.
- ✓ Everyday dialogue.
- ✓ By using them—I am a CSR so this program helps me see the other side of the business.
- ✓ Ask questions.
- ✓ By using them.
- ✓ Use when I return to office.

What is your overall opinion of today's program?

- ✓ Good.
- ✓ It was very good. It would be nice to have it as a half-day program so that we can go deeper into the subject matter.
- ✓ Very good; need more time or condense the topic.
- √ Very good.
- ✓ Very well presented.
- ✓ Very good.
- ✓ Andy had too much good info to share in time allotted.
- ✓ Great info; always can use new ideas.
- ✓ This is good info to take back with me.
- ✓ Great.



- ✓ I loved it.
- ✓ Excellent; I would love to be able to attend others.

What do you wish there had been more time for?

- ✓ Selling.✓ Examples.
- ✓ Elaborate in a specific topic; scripts.
- ✓ I though tit was about right, maybe a little too long.
- ✓ To finish the exercises.
- ✓ Selling tactics.
- ✓ More time for individual specific problems he did spend a lot of time but needed even more.

Please give any other comments that you would like to make about the program content or the speaker.

- √ Coffee!**
- \checkmark The coffee/beverages were removed too soon from the room; it was removed as soon as lunch was.**
- √ Have him back for longer.
- ✓ Leave the coffee and soda throughout the entire meeting caffeine!**

**Note from Rose – I didn't realize they'd cleared the coffee until it was already gone! This was a different banquet staff than we usually have at the Crowne and our "regulars" know to leave it....sorry about that!



April 11, 2012

Andy Gole Bombadil LLC POB 637 Martinsville, NJ 08836

Hi Andy,

When you introduced yourself at a networking meeting three months ago, I had no idea I would be hiring you for 2 half day seminars, but there was something in your "30 second commercial" that made me want to meet with you.

As you know, our company, The Center For Client Retention (TCFCR), provides research, consulting and training for companies to improve customer satisfaction and increase the percentage of repeat customers.

In addition, my first book, *The Welcomer Edge: Unlocking the Secrets to Repeat Business*, was just released and with all of the publicity around the book, I saw a window of opportunity to leverage the book and an upcoming conference, where I was delivering one of the keynote addresses centered on the concepts in the book.

After having lunch with you at my office, and subsequently two more discussions on the phone, I reached 3 conclusions:

- We don't have a business development "mindset" instead we just assume that leads will appear on a consistent basis, without initiating a sales plan
- We need help to change organizationally, to take advantage of the book's excitement, our current list of Fortune 500 clients and our excellent reputation we have built for nearly 25 years
- You had the experience to provide us with the guidance and tools to make us successful

In fact, I wanted your help to start a change process, which could double the size of my firm. I do like to walk before I run, so I suggested you offer us two half-day seminars. I know this isn't your typical practice, but I greatly appreciated your flexibility.

300 Connell Drive – Suite 1200 Berkeley Heights, NJ 07922 Phone: 973-258-9400 Fax: 973-258-9301 Email: rshapiro@tcfcr.com

www.urgencybasedselling.net



"Andy showed us an easy way for getting "engagement" with the prospect, which had an immediate positive impact on my getting more appointments and closing more sales."

"Andy moved us from an interest based selling method to an urgency based selling method. We are expecting to double our advertising sales to pharmaceuticals next year as a result of his methods."

Andy's "must have" show stopper talks include:

The Crisis in Relationship Formation

Is your existing referral network productive/optimized? The "do or die" principle applied to relationship forming. How to form a relationship – the thresholds you must cross. Why "relationship salespeople" usually are not. How to generate serious leads. How to avoid the crippling paradoxes that prevent relationship formation.



Shatter the myths that destroy sales!

Crisis in Sales Leadership

- 1. What causes the crisis selling fundamentals
 - a) values
 - b) selling tools
 - c) selling process
- 2. What good selling looks like case history
- 3. The challenges in sales leadership
 - a) why sales managers don't lead
 - b) 4 qualities they need





Why you need hybrid Entrepreneurs

So many companies fatally try to hire entrepreneurial salespeople. They fail, because there aren't enough to go around. What they should seek is: the hybrid entrepreneur. With the right ethos, sales tools and sales process, they get entrepreneurial outcomes.



Andy can tailor his talk to your need.





Andy Gole Bombadil LLC PO Box 637 Martinsville, NJ 08836

Friday, April 2, 2010

Dear Andy,

I want to take a moment to thank you for your time these past six months teaching me your Urgency Based Selling® System. As a sales professional with 13 years experience, I have to admit I was a bit skeptical at first. With various training via seminars, sales trainers, books and publications over my career, I didn't think there was much I didn't know. Let me be the first to admit, I WAS WRONG! I have had countless "Aha" moments through the course of our training sessions and time you have spent with me in the field on the front lines.

I laughed the first time I saw your 18 step Standard Sales Call and felt you were overcomplicating the sales process. I have realized, through tangible results, that is not the case. Furthermore, I have learned if I 'pull a Jamison' - if I skip a step - I am severely hurting my opportunity to close the prospect. You are right - do the process 100 out of 100 times, and the process takes care of you.

I have realized that although I have had success in the past, I was really more of an order taker than a salesperson. Not anymore! It has become part of my DNA to regularly challenge my prospects. To sell with moxie! Activities like tossing sodium in water (it explodes), using controversial marketing pieces, pushing urgency, focusing on business vs. social values, and storming the Bastille, to mention a few, have become part of my standard operating procedures. You have even made my whiteboard, (which isn't easy to do,) with key concepts that help me stay focused on a daily basis. Here are two of my favorites: "The only way to sell is to operate at the level of urgency." and, "The sales battle takes place in my mind, not in the field."

I want to thank you again for sharing your sales knowledge with me. I am very grateful to Standard Casing for investing in the Urgency Based Selling® System. I'm sure it's difficult for a company to justify an investment of this kind without being able to quantify up front the end result. I just benchmarked the last 6 months with my first 6 months. I closed very little new business in the first 6 months, before we started the program. I have closed about 20 accounts in the 6 months since we started the program.

From my standpoint it was one of the most important investments my employer could have made. Please feel free to use me as a reference. I would be glad to talk anyone interested in your services, especially the skeptic.

I look forward to updating you on many more victories in the near future!

Best regards.

Chris Barnett

The Standard Casing Company Inc.

chrisb@standardcasing.com

248.766.1918 cell

Founding Member

165 CHUBB AVE., LYNDHURST, NJ 07071 Tel: 201-434-6300 Toll Free: 1-800-847-4141 Fax: 201-434-1508

E-Mail: casings@standardcasing.com

November 23, 2009

Andy Gole Bombadil LLC POB 637 Martinsville, NJ 08836



Dear Andy,

For some years, I have been concerned my sales force didn't sell with a sense of urgency, nor get sufficient prospect commitment in the sales development process.

When my accountant told me about your Dec., 2008 sales seminar, with a focus on urgency, I was intrigued and I attended. I returned for your encore seminar in March, 2009 on **proving**. After that seminar, I asked you to present a sales seminar at my annual sales meeting in June.

Don't get a swelled head, but I have attended dozens of similar seminars over the years; this was the first time I ever told my partner – Andy Gole is someone we need to invite into our business.

We hosted salespeople for the June annual sales meeting, who participated in your customized seminar; it was very well received. One of our key vendors attended and commented that he had seen about 100 seminars of this type over the last 30 years; usually he dreads them, yours was the best he ever had seen. I was particularly impressed by the way you read a book I was discussing with the sales team, and integrated the material into your seminar.

After the June seminar, I invited you to submit a proposal for bringing Urgency Based Selling® to Standard Casing. I had some reservations, as you had never worked in my business and casings are a pure commodity. But your theory and practice were so compelling, and so in alignment with my value system, that we invited to bring Urgency Based Selling® to Standard Casing.

Your Phase 1 study of our business was tough for all concerned. You asked extensive challenging questions, I had to divert time to assess your work product. Your new messaging was "out of the box" and a little edgy for us. But I knew we had to embrace new ideas to grow – so I approved your direction. Your resultant "brainstorming book" is a great resource for us.

A major problem you had to solve was self-limiting assumptions, especially this one: it takes 6-12 months+ to form a relationship and get business. This was a major stumbling block, especially for our new sales team in Detroit. I asked you to fly out and work with them in the field. The results were exhilarating. Within 7 weeks of your Detroit visit, we closed 3 major accounts, which until that time, wouldn't even see us.

Perhaps more importantly, you have changed the value system of the firm, moving it from "best efforts" towards "do or die". Not everyone is on the "do or die" program yet, but we have at least 1 salesperson leading the way for the rest of team. Turning "storming the Bastille", the necessary work to initiate an opportunity, into a fun project, is revolutionary.

Having a common sales language, with built in hard metrics, has facilitated the growth and development of the sales force. We all know what is meant by: material difference, urgency, proving, PIK's, the standard sales, the battle plan, etc.

You also overcame another concern – distance learning. We have salespeople in 4 states that tune in weekly to your Go To Meeting seminars; without question, they are effective in catalyzing change. Your sales management system effectively reinforces the change process and helps me manage.

I would be glad to be a reference for you.

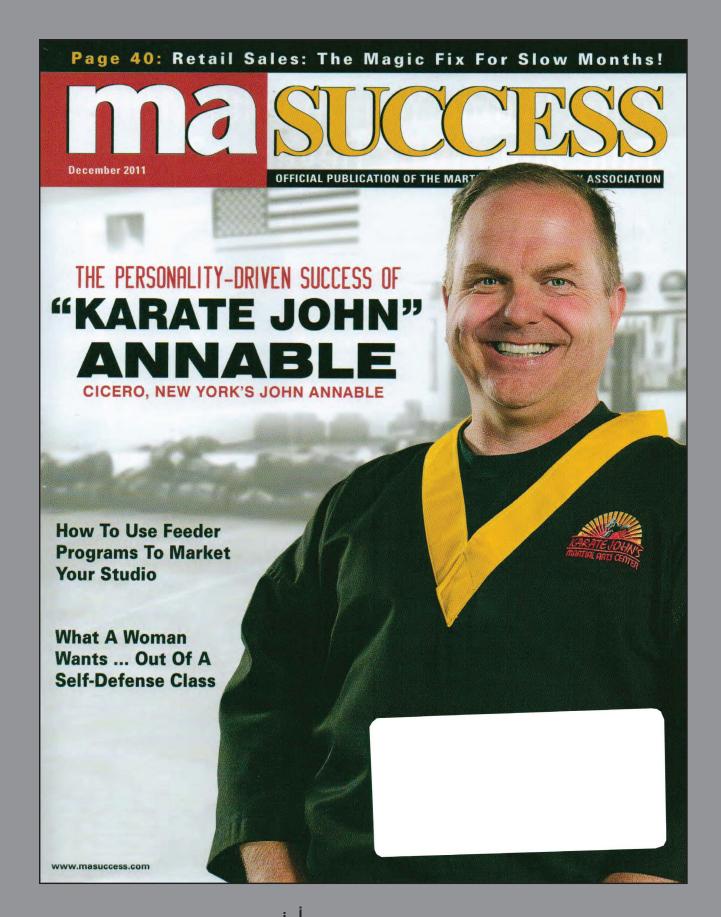
Sincerely,

Joel Koss, Executive Vice-President

(SAKS)

165 CHURB AVE LYNDHURST. NJ 07071 Tel: 201-434-6300 Toll Free: 1-800-847-4141 Fax: 201-434-1508

Articles



− By Joe Galea

Joe Galea is the president of Member Solutions, a leading martial arts billing company. Galea, one of Member Solutions founders, has been counseling school owners for 20 years, and spends part of every day speaking with clients and industry leaders. He can be reached at Joegalea@membersolutions.com or by phone at 1-888-277-4409.



Selling with Urgency. Part 1: Got Moxie?

his month, I'm launching a detailed, three-part series on "Selling with Urgency." I'm interviewing my personal mentor Andy Gole to get his expert opinions. Andy is a successful and sought-after personal-sales consultant and trainer who has worked with dozens of companies (including ours for five years) to improve their selling strategies. The following are valuable excerpts from this informative conversation that, hopefully, should change the way you sell.

Joe: Since 1984, you have started three businesses. Briefly, what's your background?

Andy: I started a sales agency in 1984, ultimately representing four factories, selling packaging on a straight commission basis. I built it to about seven-million dollars a year in sales. In 1992, I developed a product which I sold to retailers and in 1995, I started sales consulting.

Joe: How did you get into sales training?

Andy: It grew from building my sales agency. I struggled in the beginning: I was selling in a very competitive market. It was "do or die." During this time, I developed the core ideas for Urgency Based Selling®. Then, in 1992, I had just switched accountants and the new firm invited me to hear a presentation for a customized-spreadsheet product they had created.

After the presentation, I asked the firm's partner, "Is this how you guys normally sell?" He replied, "Yes, that was pretty good, wasn't it?" And I said, "No, it was terrible."

After a few days, I called him back, saying, "You need to hire me to teach you how to sell."

I had the fundamentals worked out in my mind but no track record. They brought me along on a sales call to observe. After listening for one hour, I asked three questions and closed the client for them. This experience was pivotal; shortly thereafter, they hired me.

This story illustrates a fundamental principle I teach. You get zero percent of the requests you don't make. You need to be very bold in business development.

Joe: Why aren't people bold enough in their selling?

Andy: I see a fundamental conflict between social and business values. Social values determine how we act at home

with our families and friends; business values drive workplace behavior. Most people, even full-time sales people, suffer from value confusion. We are socialized at home. We know, for instance, you need to give psychological space to people, but different values are appropriate in the workplace and at home. This manifests itself in the difference between "best efforts" and "do or die."

The business owner understands "do or die." You can't tell the bank, "I tried my best this month." You need to generate results. However, in the social sphere, best efforts are fine.

Consider the "I-don't-want-to-go-to-the-movies" example. You say to your friend Bob, with whom you occasionally go to the movies, "Hey there's a new Sherlock Holmes movie, do you want to go see it?"

Let's say Bob says, "No. I don't want to go to the movie." We are now at the defining point of the difference between social values and business development. You have invited Bob to the movies and he said no. What do you do next?

In a social situation, you'd probably say to your friend, "Okay, do you want to see another movie, go for a walk or eat out?" Typically, you wouldn't challenge him in a social situation. That is how we are socialized.

But the scenario should be different in a business setting. Unfortunately, we bring this "I-don't-want-to-go-to-the-movies" scenario into the workplace. It's a killer in business development.

How many people, for instance, would say in that scenario, "Gee, Bob, I'm kind of surprised to hear you say that. After all, you're a big fan of Robert Downey, Jr., who's the star. Further, you love period pieces. This is set in the 1880s and you love the Victorian England era. Finally, you are a detective novel aficionado, and Sherlock Holmes is *the* detective. So why don't you want to go to the movies?"

In my experience, Joe, not too many people would do that in a social sphere, and they carry that reluctance to be confrontational over into business. What they should do in a business setting needs to change, but they don't have the moxie.

In Part 2 next month, we'll explore what you do with your moxie — your bold behavior.

► By Joe Galea

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Selling with Urgency Part 2: Three Fatal Flaws

ast month, in Part 1 of my interview with Andy Gole, creator of the Urgency Based Selling® system, we discussed having moxie and overcoming social values. This month he elaborates.

Joe: Andy, a recurring challenge school owners face is the price shoppers, who begin by asking, "How much do lessons cost?"

Andy: Your readers should know this problem exists in almost every market. It's the reason I framed the third fatal flaw in the selling process: "Assuming prospects know how to make a decision." Usually, they don't, particularly for the infrequent decision like choosing a martial arts studio.

Joe: What are the first and second fatal flaws and how did you develop them?

Andy: From studying about ten different selling systems, I found three fatal flaws common to all of them. The first two are:

- 1) Assuming the prospect comes to us with serious intent.
- 2) Assuming the prospect believes what we say.

Joe: You mean they don't? (Laughter) The system you created solves these fatal flaws through a focus on urgency. This is the key theme in your sales training, right?

Andy: Yes. Without urgency, you can't close the sale. All selling is [done through] conversations and there are two types, safe and serious. In a safe conversation, you'll never get a stick of business, because the prospect is in that conversation for a different reason than you are. A serious conversation is one in which the prospect has a compelling need and is willing to discuss it with you. The safe/serious distinction underlies the fundamental distinction between interest and urgency.

Joe: What's the difference?

Andy: Interest is a lead, someone willing to be in a conversation, typically a safe conversation. Urgency is a compelling reason to act now. We can only close on urgency. It is sales' job to turn interest into urgency, safe into serious.

Selling is an input-output machine. In comes a safe conversation, out goes serious. We do this through material difference — a difference so strong it motivates a change in behavior. This is diametrically opposed to social selling, where we focus mainly on getting people to like us so they'll buy.

Consider these two callers. One says, "I need martial arts lessons for my son because he is out of control; he needs discipline." The

other says, "My son is interested in martial arts." The first has urgency, the second only has interest. You need to create urgency.

Joe: Many feel that selling takes place in the introductory lesson and actually the tough selling occurs when prospects call around asking, "How much?" At best, they have interest; typically, there isn't any urgency yet. Still, those first conversations are critical to creating enough visits to the school for intros.

Andy: Selling is critical to converting call-ins to demos and for securing introductions.

Joe: What guidance can you offer here from a business-development perspective?

Andy: First, schools should be keeping statistics: How many inquiries do they receive? How many convert into introductory lessons? That's where the strongest selling and business development takes place.

Second, they need to develop leads, introductions to people their customers know. It is essential that schools use existing customers to acquire more leads. Getting introductions needs to be approached as sales.

Joe: Example?

Andy: You have a satisfied customer and ask, "Do you have any friends who want to train?" If the student says, "Let me think about it" or "I can't think of anybody," it's possible that's true. But it's more likely the student is refusing to give it thought.

Selling means taking this situation and converting it into an active lead, maybe even persuading the student to make a personal introduction. This requires moxie and business values. This is real selling.

Annually, in mature markets, figure you will lose five to ten percent of your business. In recession years, that number could double. So, you require a "do-or-die" approach to lead generation. It is absolutely essential.

Joe: I don't think owners would debate losing 15% of their memberships in some way. Many school owners have contests/ referral programs to increase lead flow. You're saying to take a proactive approach and directly ask for referrals?

Andy: Yes! In Part 1, we explained that social versus business values can cause hesitation in this approach. In Part 3 next month, I'll explain what we should do about it.

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-- By Joe Galea

Joe Galea is the president of Member Solutions, a leading martial arts billing company. Galea, one of Member Solutions' founders, has been counseling school owners for 20 years, and spends part of every day speaking with client, and industry leaders. He can be reached at Joegalea@ membersolutions.com or by phone at 1-888-277-4409.



Selling with Urgency. Part 3: The Change Process

n Parts 1 and 2, Andy Gole, creator of the Urgency Based Selling® system, provided us with the three fatal flaws in the selling process and we discussed the conflict between business and social values.

Joe: Andy, now that we have better insight into most sales encounters, how do our readers implement change?

Andy: We need to set reasonable expectations for moving team members from social to business values. Very often, the owner needs to make the same journey. In fact, the value change is one of three paradigm shifts that are generally needed — *values*, *sales process* and *messaging*.

You need a change process to move the needle from 0 to 100. You can't do that in one fell swoop. You can't expect a memo approach to work. If you move the needle too quickly, without an appropriate change process, you fry the nervous system.

I have gone through this experience with many firms. You need short-term, reasonable objectives with weekly oversight. Ideally, a cohort group goes through the change and members learn from each other.

Joe: Why don't firms establish strong change processes to help their teams make the conversion from social to business values?

Andy: There is a fundamental problem in how most business owners look at change. We tend to embrace command and control leadership. We have a meeting and say, "This is how we are going to do things." That perspective is not sensitive to how change takes place — over time, in small bites. In general, as a culture, we are not skilled change agents.

The situation has irony for martial arts studio owners. They are geared to understand change. When they teach their students different skills, they break the change down into units. They have drills. They teach reflexes and muscle memory and, eventually, they integrate it into a whole. They do not expect a student to function at the level of an advanced black belt at the first lesson.

So, the martial arts community implicitly understands the change process.

Joe: You make a really interesting point. I would like to add that, through the process, the student improves, which offers proof that change is necessary for development.

Andy: There's a second reason why school owners should feel comfortable with business development: Their thought process is influenced by Eastern thinking. They are familiar with the concept of yin and yang, opposing forces. There's also a yin and yang to selling. There are soft and strong moves, and an oscillation between states.

This is a second advantage a martial arts studio owner has over a typical business owner.

Joe: The martial arts industry is very open to new ideas and change, as compared to others I have researched. You may have just explained why! This is the reason I wanted to interview you. Our readers will be able to embrace a completely different approach to selling and to bringing in new students.

Andy, I sense that many of our readers struggle with selling and some even view the role with some distaste. They see something fundamentally wrong with selling. Any thoughts on this?

Andy: Many salespeople don't realize selling is heroic. There's a common negative stereotype unfortunately popularized by Arthur Miller in *Death of a Salesman:* Willie Loman stands for the salesperson as a slimy loser.

I refer readers to Joseph Campbell's *Hero with a Thousand Faces*. Campbell studied hero myths throughout hundreds of cultures spanning thousands of years. He talks about the roles and the rules of the hero. We become a hero when we cross the *first threshold*; when we leave our village — to slay the dragon, rescue the damsel in distress. We step outside of the world as we know it.

The equivalent in selling is when we grasp the distinction between social and business values and cross over from one to the other. There are at least three thresholds we need to pass en route to becoming a hero in selling. The successful salesperson is a hero and a warrior.

Joe: I agree completely. In sales, we change lives by selling change. That is heroic. Andy, thank you for being my mentor and for sharing some of your basic principles with our readers.

Readers, an MP3 of the entire interview with Andy is available upon email request.

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By Joe Gale

loe Galea is the president of Member Solutions, a leading martial arts billing company. Galea, one of Member Solutions' founders, has been counseling school owners for 20 years, and spends part of every day speaking with clients and industry leaders. He can be reached at Joegalea@membersolutions.com or by phone at 1-888-277-4409.



The Standard Sales Call

hanks for the many compliments on the "Selling with Urgency" series that appeared in the November 2010 through January 2011 issues. Here's more from my informative interview with Andy Gole, a personal-sales consultant and trainer who has worked with dozens of companies including Member Solutions. Here we discuss the "Standard Sales Call."

Joe: Andy, when I speak with school owners, I often hear contradictory statements about selling. Those who are not satisfied with their overall business-development effort often say they leave it to staff to formulate a selling style that's consistent with their personalities. In contrast, you advocate a "standard sales call" for all. Why?

Andy: Businesses, including martial arts studios, can be conceptualized as systems: systems for teaching self-defense, etc. A major grievance of many business owners is that they can't systematize selling. The standard sales call is a step-by-step procedure to take the prospect through a thought process, from first contact to decision [the close].

Joe: What are the major aspects of a strong standard sales call?

Andy: There are three basic parts: 1) Initiating and fertilizing the conversation; 2) fact-finding and problem-solving; and 3) managing the opportunity.

Joe: What do you mean by "fertilizing the conversation?"

Andy: The first fatal flaw in the selling process is assuming prospects enter the conversation with serious intent. This is true particularly when prospects call a school for basic information. The school needs to give the prospective member a compelling reason, on the phone, to be in a serious conversation. This sets up fact-finding and problem-solving and, ideally, the "Intro Lesson" [demo].

Joe: Can you expand on what you mean by fact-finding?

Andy: Why is the prospective student considering lessons? Many times, they won't volunteer the information, so we need to ask. I remember a case where a client had this discussion:

Staff: Why are you considering martial arts lessons?

Student: I thought I might use martial arts to get into better shape.

Not a bad answer. But further probing showed a compelling motivation.

Student: I want to look better physically.

Staff: Why do you want to look better physically?

Student: So I feel more comfortable on the social scene, at the heach.

Staff: You've been going to the beach for years, haven't you? Why is this of concern now?

Student: I was embarrassed last summer by how I looked.

Joe, that *was* a compelling reason to get in shape. Some prospects aren't ready to share immediately.

Joe: How is the "demo" utilized?

Andy: The demo is an essential part of managing prospects. It's how we prove we are the solution to their problems. Seeing/experiencing is a critical part of believing.

Joe: Why might a school need more than a demo to prove it's the solution to the prospect's problem?

Andy: Remember the second fatal flaw: People don't believe what we say. The demo gives them experience. Skeptical prospects want to know there is consistency. A proving kit — including testimonial letters — can help provide that consistency.

Joe: How do we handle objections?

Andy: The third and last fatal flaw is when we think prospects know how to make a decision. An essential part of the standard sales call is teaching prospects how to select a martial arts studio. We do this through questioning. For instance:

Staff: What's important to you in selecting a martial arts studio?

Prospect: Price.

Staff: Nothing else?

Prospect: No.

Staff: What about ... expertise in coaching you through a change process, etc.?

Through questioning, we establish the decision criteria. When these are properly established, most objections go away.

Joe: How do you close the sale?

Andy: If you meet the decision criteria, the next question is, "What do you want to do now?" And the answer you want is, "Get started." This is the purpose of the standard sales call.

An MP3 of the entire interview with Andy is available upon email request.

By Joe Galea

Joe Galea is the president of Member Solutions, a leading martial arts billing company. Galea, one of Member Solutions' founders, has been counseling school owners for 20 years, and spends part of every day speaking with clients and industry leaders. He can be reached at Joegalea@ membersolutions.com or by phone at 1-888-277-4409.



Entrepreneurship and The Sales Crusade

recently interviewed Andy Gole, founder of the Urgency Based Selling® system. Below is the final excerpt from the informative interview in which Andy shared a wealth of knowledge in the field of selling.

Joe: Andy, you've stated that the classic observation, "Selling isn't rocket science," is a myth. Please expand on this

Andy: Selling is complex, Joe. Factor these three major components. Customer Service: Responding to customers' needs. Account Management: Developing and implementing a plan to increase profitable sales with an existing customer. Business Development: Bringing in new customers.

We've been focusing our discussion primarily on business development, but we need to be sensitive to its paradox, too.

Joe: The paradox of business development? Please explain.

Andy: Many owners have limited faith in the business-development skills of their sales teams, so they have them handle the incoming calls and the email/Internet leads. Consequently, there's no time for business development, only customer service.

Joe: Isn't that the norm?

Andy: Unfortunately, yes. Business development has an entrepreneurial component. There is uncertainty, research, and exploration. We need to manage the reversal curve. When owners staff for customer service only, they make it impossible for business development to take place. This is the paradox: Claiming they want business development, and then making it impossible.

Joe: We've been discussing numerous ways of instilling entrepreneurship. Is there some glue that holds everything together and provides direction?

Andy: Yes: the sales crusade. It's a commitment to long-term radical change and business development. Ultimately, this is what I hope to achieve for my clients every day.

Joe: What else is involved in the sales crusade?

Andy: It is typically a top management/ownership responsibility to build the proper inspirational culture, especially for the sales crusade.

Joe: What goes into creating a powerful, inspiring sales culture and crusade?

Andy: Based on my experience, there are eight key elements: vision of what is possible, concepts, visual components, maxims, community, humor, challenges, becoming efficacious, and successful.

Joe: Can you elaborate on these?

Andy: Sure. Vision: This is perhaps of greatest importance, both in personal development and for company results. This is conveyed most effectively through foundational stories, e.g., in selling, do or die stories, where the salesperson had to close the sale in a no-win scenario.

Concepts: Unique, powerful ideas explain the world and help the team become more effective. For example, measuring intermediate sales success through payments-in-kind — what we ask the prospect to do to make sure the prospect is engaged.

Visual Components: Iconography to match the concepts.

Maxims: Commonsense wisdom. For example, "You usually get zero percent of the requests you don't make."

Community: Tracking and celebrating success; teaching from within. Case histories are essential. This process also converts the private-property perspective — my prospects, my clients — into a company perspective.

Humor: We all perform better when we're having fun. For example, the idea of "crossing the streams" from the movie *Ghost Busters* can be used to illustrate mixing social and business values.

Personal Challenges: These are essential to the individual's growth. In this regard, a paradigm shift, offering a cohesive vision, provides meaning and challenge.

Becoming Efficacious: The system needs to work and help team members increase sales. When success builds self-respect, it becomes contagious and self-sustaining.

It is top management's job to ensure all these elements are present. Then we need a spark to ignite and sustain the crusade. The leader needs to provide the spark.

An MP3 of the entire interview with Andy is available upon email request.



Andy M. Gole

Sherlock Holmes, Geometry Proofs, and Backward Reasoning

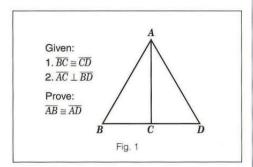
In solving a problem of this sort, the grand thing is to be able to reason backward. That is a very useful accomplishment, and a very easy one, but people do not practice it much. In the everyday affairs of life, it is more useful to reason forward, and so the other comes to be neglected. . . .

.... Most people, if you describe a train of events to them, will tell you what the result would be.... There are few people, however, who, if you told them a result, would be able to evolve from their own inner consciousness what the steps were which led up to that result."

-A Study in Scarlet, by Arthur Conan Doyle

ecently, while coaching a fifteen-year-old geometry student named Alex through a congruent-triangles problem, I remembered the preceding quotation from a Sherlock Holmes story. The problem asked us to prove that $\overline{AB} \cong \overline{AD}$, given the information and diagram in figure 1.

Backward reasoning is an effective strategy for searching existing knowledge and solving proofs



The standard textbook's linearly presented solutions were not helping Alex. These solutions implied that the student grasped the solution and all its components in a single thought, and then he or she listed the steps. Undoubtedly, many students are capable of such thought, particularly with an easy proof. However, another technique showing a

search process is useful—or even necessary—for more complicated problems. Sherlock Holmes's backward reasoning is an effective strategy for searching existing knowledge and completing morechallenging geometric proofs.

I coached Alex through many discussions employing backward thinking to help him cultivate the skill. The following is the essence of a typical conversation we had that introduced these skills for tackling the problem in **figure 1.**

Alex. How do I solve this problem; how do I prove that $\overline{AB} \cong \overline{AD}$?

Coach. Maybe we can solve it by thinking backward.

Alex. What do you mean by thinking backward? Coach. I mean starting at the end and working your way to the beginning. Ask yourself what step comes before this one.

Alex. How can I do that?

Coach. Well, for openers, let's look at the end point.

Alex. You mean that $\overline{AB} \cong \overline{AD}$?

Coach. Right; what methods do we have to prove that $\overline{AB} \cong \overline{AD}$?

Alex. Well, if triangle ABC was an isosceles triangle, the sides would be equal.

Coach. Do we have enough information to establish that triangle ABC is an isosceles triangle?

Alex. No.

Coach. Well, what other methods do we have? Alex. If triangle BAC and triangle DAC were congruent, we could show that $\overline{AB} \equiv \overline{AD}$.

Coach. How could we establish that the triangles were congruent?

Alex. SSS, ASA, and SAS.

Andy Gole, andy@amgcan.com, teaches in the MBA program at Fairleigh Dickinson University, Teaneck, NJ 07666. He uses elements of algebra and geometry to illustrate entrepreneurial search and management. He is interested in integrating mathematics into other disciplines, particularly the humanities.

MATHEMATICS TEACHER

Coach. Looking at the given information, does one of these methods seem more fruitful? What do we have to work with here?

Alex. Well, the givens tell us that we have a side and an angle that are congruent.

Coach. What else do we need to establish congruency?

Alex. Angle *B* is congruent to angle *D*, or that another pair of sides are congruent.

Coach. What might this rule out? Alex. SSS.

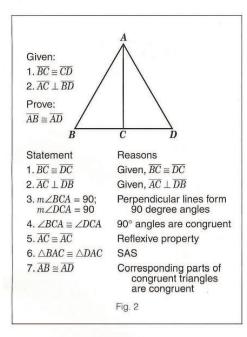
Coach. Can we establish that angle B is congruent to angle D?

Alex. No.

Coach. What does this leave?

Alex. Side *AC* is common to both triangles. This gives us SAS.

Then Alex and I sketched out the proof, shown in figure 2.



At the outset, backward thinking helps us search for potential solution paths. In the preceding example, we can look for isosceles triangles or congruent triangles to prove that $\overline{AB}\cong \overline{AD}$. Focusing on both the given and clues from previous knowledge guides us in developing a sense of the possibilities. By noting that a side and an angle are given, we know that we are searching for SAS or ASA and not for SSS. This process of noting clues and possibilities continues until the chain is complete and we arrive at the given; then we can express the entire process as a forward linear development. To the beginning

students, it may look like magic; what they see is the magic and the power of backward reasoning.

As Sherlock Holmes observes, backward thinking skills are neither inborn nor widespread. A teacher's help may be essential in mentoring these skills, that is, offering guided practice with enough appropriate examples over time. Geometry proofs provide simplified controlled problem-solving contexts and help cultivate through repetition the mental search habit.

Learning such skills can result in both general and practical rewards to the student. One important payoff is a general confidence in searching for solutions to unfamiliar and possibly overwhelming problems by learning how to limit options, as in the following car-selection example. From a time-line perspective, learning these skills is a good investment; like bicycle riding, once a person learns, he or she typically does not forget.

Learning these thinking skills through geometric proofs can also teach students important practical skills for managing everyday life. For instance, any scheduling system is based on starting with an outcome and a deadline and then reasoning backward to establish intermediate objectives. If studying for a geometry final requires three days and the final is on Friday, the student must commence studying by Tuesday. More challenging problems, including creating new products, are greatly aided by backward thinking.

Although geometry proofs offer a rich source of examples of backward thinking, other areas of applied mathematics also may involve this type of analysis. We next consider the motivational value of a real-life problem involving budgets, with tradeoffs and minimum standards. Designing such a problem to intrigue high school students can help teach the value of backward thinking. An example might be a high school student's search for his or her dream car. In our example, this used car must cost less than \$3,000, the student's savings.

Initially, the search may seem overwhelming; local used car lots have many cars in this price range. Just as Alex did not know where to begin when proving that $\overline{AB}\cong \overline{AD}$, the student may not see a reasonable place to begin. The student needs to prioritize. Introducing additional decision-making criteria takes the place of using givens and theorems; these criteria limit choices and guide the search. The student might decide to select a car that is red, that accelerates from 0 to 60 miles per hour in 30 seconds, and that has insurance costs that are less than \$1,500 per year. Setting these criteria is helpful, since hundreds of possible cars (or possible solution paths) can be reduced to just a few cars that meet these criteria. In other words, given the following criteria—

- 1. budget < \$3,000,
- 2. color = red,
- 3. annual insurance payments < \$1,500,

One
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options

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	Cost	Color	Insurance Cost	0 to 60 MPH
Car 1	\$2,900	Red	\$1,200	30 seconds
Car 2	\$2,900	Red	\$1,200	30 seconds
Car 3	\$2,900	Red	\$1,200	30 seconds

Fig. 3 Criteria for buying a car

Given:

- 1. budget < \$3,000,
- 2. color = red,
- 3. annual insurance payments < \$1,500,
- 4. Consumer Reports rating of good or better.

Prove

Car 3 is the best car.

	Cost	Color	Insurance Cost	0 to 60 MPH	Consumer Reports Rating
Car 1	\$2,900	Red	\$1,200	30 seconds	Fair
Car 2	\$2,900	Red	\$1,200	30 seconds	Lemon
Car 3	\$2,900	Red	\$1,200	30 seconds	Good

Fig. 4
Adding a criterion and defining the problem



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which of the three cars described in figure 3 should the student select?

At this point, the problem is manageable, but no single best solution exists. The solution seems to be similar to a situation in which Alex had mastered backward thinking and had discovered two or more solutions to a problem. Finding a criterion for selecting the best solution (assuming a best solution for the problem exists) is desirable. Perhaps Alex selects as his criterion the least number of steps. The student buying a car needs at least one more criterion. In this example, the student might identify the *Consumer Reports* rating as a final decision-making criterion. The student now can define the problem as shown in **figure 4**.

On the basis of the new criterion, only car 3 is acceptable. By employing backward thinking, an open-ended, potentially overwhelming problem has been narrowed down to a single acceptable car, the student's dream car. In general, conducting searches for important infrequent purchases (including a house) can benefit from this backward-thinking approach.

To consider another important practical example, backward reasoning can also produce dramatic results when applied to new product development. A person may start with a rough product or market concept—a product to be delivered at a retail price point identified as the desirable price by market research. The person then searches backward to discover the specific product form and method of production that meet the stated objectives. If the objectives are not met, no product can be marketed. If the objectives are met, a plan can be developed for implementation.

Backward reasoning, flowing from a sense of the possibilities, is not the only way to search or to be an effective problem solver. In fact, reliance only on this approach can limit creative solutions. However, when a person faces the ultimate test in creative thinking—a tough problem, a blank sheet of paper, and a need to search for both objective and method—backward reasoning can be a very good way to begin the search. Writing geometry proofs can teach backward thinking and give students not only a gateway to higher mathematics but also a practical tool for daily life and the potential to stimulate creative thinking. **MT**



From page 542:

Cover puzzle hint:

Would symmetric properties of the words help here?

The next hint appears on page 554.

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MATHEMATICS TEACHER

Hard Facts

- 1) Sales increase of 10-20% over base within 1 year
- 2) Increase closing ratio by up to 100%
- 3) Condensing the selling cycle by 20%
- 4) Increase lead flow 20%
- 5) End sales force blackmail
- 6) Shut down the country club for sales people
- 7) Implement rigorous sales standards and processes
- 8) Materially improve management of sales team and of sales management
- 9) Add necessary leadership qualities to sales department

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