

Getting Past the Gatekeeper



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**The more cordial
the buyer's
receptionist,
the greater the
odds that the
competition
already has the
order. (Hee hee.)**



What we're covering today:

- Just who is the Gatekeeper anyway, and why are they blocking you?
- Advice from the Gatekeepers themselves
- Proven strategies to persuade them to let you pass
- How to increase your credibility with Gatekeepers
- How to transform them from goalie to the welcome wagon
- Tips from the best sales pros in this industry and out.
- What works for you – a tip-sharing session.

Just who is the Gatekeeper anyway... and why is he/she blocking you?



This is the individual whose job it is to prevent people getting access to the Decision-Maker.

- Personal assistant
- Receptionist
- Switchboard operator
- Purchasing agent
- Mid-level manager
- Vice President of No
- Armed security guards
- Voice mail, SPAM filter, email box

Gatekeeper Misconceptions

Gatekeepers are not sale preventers.

Saying no is not what a gatekeeper does.

Their job: protect and insulate their boss from distractions and things that will ultimately waste time.



3 keys when addressing a gatekeeper

1. They know more about the target contact than you do
2. They know more about the company than you do
3. They usually care about the company and their career so they want to do things for the company that are beneficial



Describe the typical gatekeeper



The life of a gatekeeper



- Generally low-level administrator
- Goal: keep unnecessary distractions away from high-level decision-makers.
- Multi-tasking
- Often have multiple bosses or internal customers
- Squeeze in projects in between calls
- Most work some version of a nine-to-five job—so most gatekeepers aren't even at the office early in the morning or during the evening.

Walk in their shoes

Want to be treated like a person,
valuable

Value honest, heard every trick
in the book

They want to help the company

Enjoy having a good day

Enjoy having fun

Love being remembered, feeling
important, special

Unsung heroes, value praise

Love getting free stuff



3 Reality checks for salespeople

1. Your purpose is to create a message so the person hearing it says, ‘Ooh, my boss would be interested in this. I’d better pass it on.’ ”
2. You have no birthright to see someone or be seen. Gatekeepers have heard it all before – every line, every tactic.
3. There’s no magic sure–fire way to get around the gatekeeper every time. BUT, if you are a student of creativity, there is always A way – just not the same way each time.



Gatekeeper red flags

They will be on-guard if:

- You ask "who is in charge of..."
- You don't know the person's name you're calling on
- You mispronounce it terribly
- You walk in and hand your business card



What do gatekeepers value most?



What's important to them?



Respect

- Politeness and respect.
- Show that you appreciate what they do, as well as their knowledge and opinion.
 - No patronizing with bland compliments about their phone voice.
 - No selling to them.
- Explain you understand a problem the company faces and you think you have a solution that might fit.

What's important to them?



Offer Value

- Do your research, understand their problems.
- Use language they understand but never treat them as inferior.
- Act as if you are in the know by using your research – gives confidence.
- Give clear instructions on what you want – an appointment, call, something else?

What's important to them?

Persistence and Follow-Through

- Show you're committed without being a pest.
- Don't start ignoring the gatekeeper once your conversation with the decision maker starts.
- Offer praise about the gatekeeper to the decision maker.
- Keep the gatekeeper informed of your progress with the sale.



The work life of a high level prospect

- Busy working long hours, usually 7 a.m. to 7 p.m.
- Their most productive hours: 7 - 8:30 a.m. & 5:00 to 7 p.m.
- Some work a few Saturdays each month to catch up.
- Target them during "unguarded" times!



Call when the gatekeeper's away!



Experiment with sales call timing



- Seasoned prospectors split into two teams.
- Team “A” called during the standard nine-to-five workday.
- Team “B” called only outside standard nine-to-five workday—7 to 9 a.m., 5 to 7 p.m., or on Saturdays.
- The results: Team B converted 30% more high-level prospects than B.
 - Reported less stress, rarely dealing with gatekeepers!

What you really want from the gatekeeper:

1. Put me through to the contact.
2. Gatekeeper, deliver my message, please.
3. Get the contact's personal email address.
4. Put me through to the contact's voice mail.
5. Pass me to a lower manager with a direct referral.
6. Not needed – go away!



Advice from the Gatekeepers themselves...



- “As a gatekeeper of the President of a large corporation, I divert 20 to 30 calls per day from our President. The ones that impress me the most (and by the way, that's what it takes), are the ones that give me all the valuable information up-front. Most people call and insist on speaking only to him and the answer that works the best is "he's not here".
- If they are up-front with me, telling me what they need him for and giving me the information I require to have a discussion with him about it, then it's possible that he may be interested and have me return their call.
- Most of the time people are calling for the President and he is not the person that they need to speak with at all. In our company, maybe a CEO, COO, Vice-President, Office Manager, or Sales Manager would be more likely to handle the phone call. If the person calling explains to me what it is they want, they can usually be referred to someone else that handles whatever it is they are offering.”

Advice from the Gatekeepers themselves...

“Have the name of an individual to speak to. Do some research, get a name, and careful how you answer the question "What shall I tell him it is about"!”



Advice from the Gatekeepers themselves...



- “There are so many poor salespeople out there, that we gatekeepers are often irritated to death by sales calls, from people who need **sales training seminars**. When we do get a salesperson on the phone who is courteous, professional, has an interesting voice, and a sense of humor, it's a refreshing change. Be like that and you will stand out, and that is your first hurdle.”

Advice from the Gatekeepers themselves...



- “It's important that you get my name. You want to make this a personal conversation. You want to enlist my aid in the sales process and nothing is more personal than my name. And I hope you remember it when you call the next time, so write it down. Add it to your database.
- And be sure you repeat the name to ensure that you have it correct. If it's an unusual name, this is when you would ask for the correct spelling and double-check the pronunciation.”

Advice from the Gatekeepers themselves...

- “When you first reach the decision-maker, you need to capture their interest and establish rapport. Try giving them a sincere compliment, perhaps about the person who just put you through: “Jack, my name is Marlene Franklin. Thank you for taking my call. Anne was very helpful and represents your company well.” It's that fast and simple. You've begun on solid ground.”



Advice from the Gatekeepers themselves...



- “If he’ not in, and you’d rather not leave a voice mail, just tell me...” Anne, I’m in and out a good bit during the day and I’m sure he is very busy. Rather than having him waste time trying to reach me, I’ll just call back. When is the best time to reach him?”

Tips from the Gatekeepers

“If English is your second language and I have a hard time understanding you, **YOU WILL NOT MAKE IT THROUGH.** The kiss of death is to call, speaking in broken English, then ask for “whoever makes the decision on <insert topic here>”.



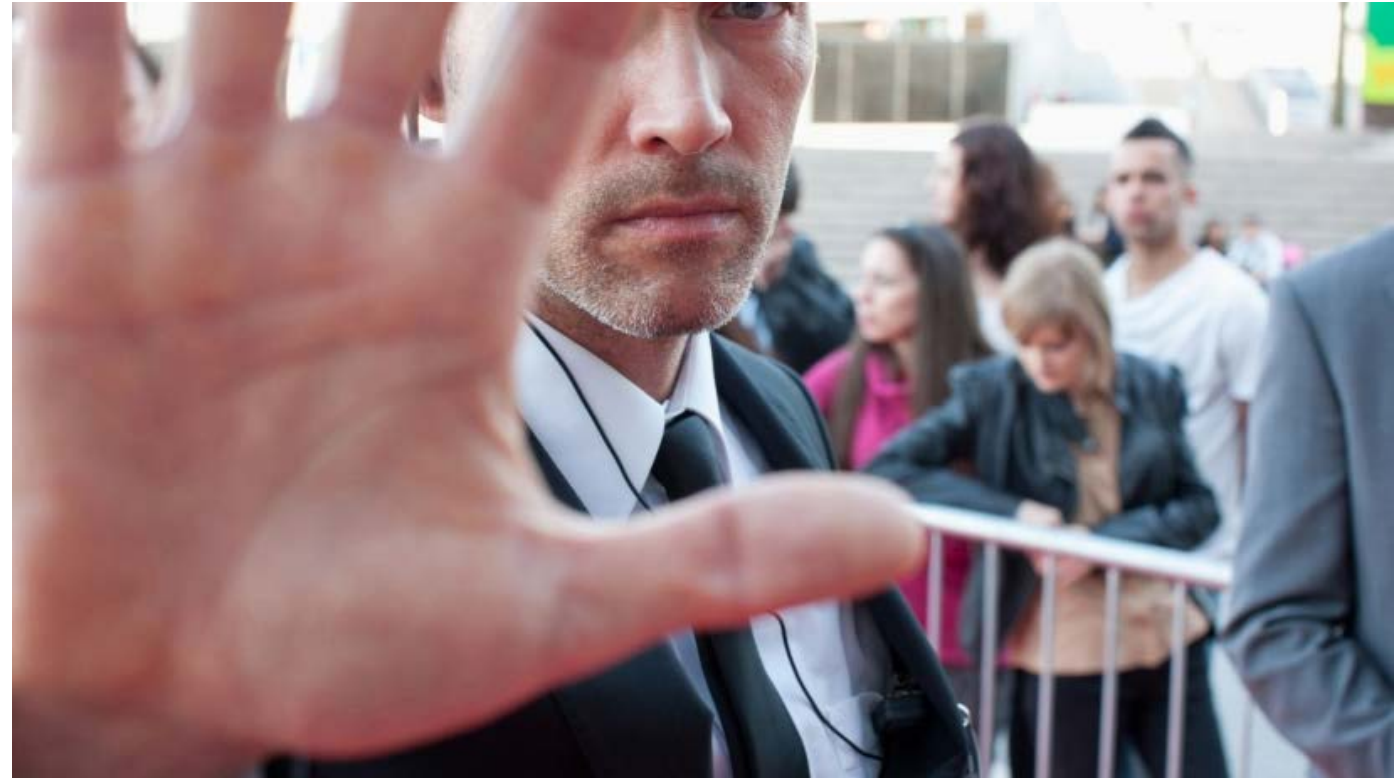
Tips from the Gatekeepers



- “If you can affect an intriguing accent such as British, Scottish or Australian accent, you have a better shot at getting through a female receptionist. You will hear our voice light up! This will make it easier for you to “bond” with her while trying to “fish” for pertinent information.
- A deep Southern accent, with a lot of “y’all’s” and grammar that reinforces the fact that Georgia ranks 50th in SAT scores will not help. Mention that you have a blog, and I will hang up on you.”

How to be BLOCKED

“Don’t bother lying. Saying things like, “I’m returning (fill in the blank)’s call, or “I spoke with so and so last week and they asked me to follow up” just might get you through. BUT, if we find out you lied (the people we are paid to protect WILL let us know of our slipup), you will be our enemy, for life (this life term will not expire, we will remember you and your company LONG after we’ve left our current employer).”



How to be BLOCKED

“DO NOT try to intimidate us.

Many a salesperson (both men AND women, SHAME on you women) will revert to Neanderthal intimidation tactics when confronted by a diligent Gatekeeper.

NEVER, EVER utter the words, “You’re just the receptionist” in anger, for this will be your death knell. The silence will be deafening just before you hear the almighty “click” of your last chance at getting through. EVER.”



How to be blocked



- “In your frustration and fury at my boldness for hanging up, should you feel the urge to call back and wish to speak with MY manager to complain about being treated with the same level of rudeness you instilled on me, (the Gatekeeper reports to EVERYONE, I can pick and choose WHICH manager to send you to), remember this...be careful what you wish for. I have no qualms whatsoever about passing you through, he/she will likely tear you a new one harsher than I because now you’re wasting both my time and THEIRS.”

How to persuade them to let you pass

TIP 1: THE GATEKEEPER IS NOT THE ENEMY

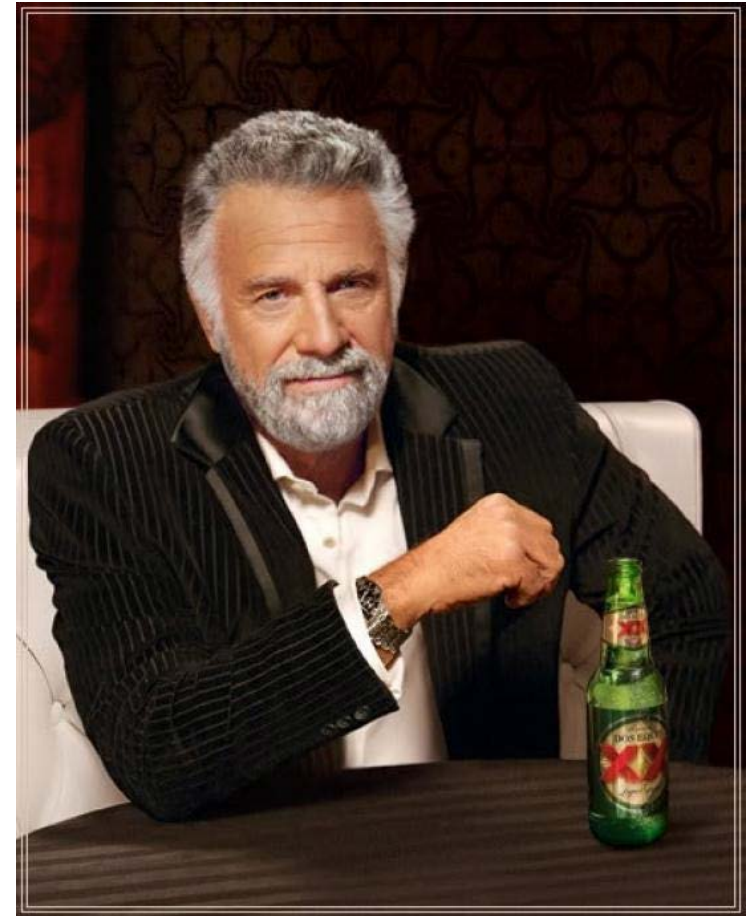
- Seeing the Gatekeeper as the enemy creates a self-imposed psychological barrier that it will be difficult, if not impossible to remove.



How to persuade them to let you pass

TIP 2: SOUND SENIOR

- Management never gets treated the same as the workers. If someone believes that you are important, they will treat you differently.
- Use a relaxed calm voice, speak slowly and articulately and don't divulge more than necessary.
- If the Gatekeeper senses that you are their senior, they will not risk offending you by probing too deeply.



How to persuade them to let you pass



TIP 3: TAP THE GATEKEEPER'S WEALTH OF KNOWLEDGE

- Their first role is RESTRICT DISTRACTIONS to their boss's daily routine, but they do know a great deal of important information about the person and the business.
- Use this opportunity to check that the person that you want to speak to IS the decision-maker.
- Ask simple, non-intrusive open questions to build pictures of both Gatekeeper and Decision-Maker.

How to persuade them to let you pass

TIP 4: DON'T SELL TO THE GATEKEEPER

- The Gatekeeper has 'powers' but no decision-making. When the Gatekeeper asks 'Can I tell him/her what it's regarding?' – do not try to pitch your product or service to the Gatekeeper.
 1. It wastes your time.
 2. It irritates them because they will just be waiting for an opportunity to tell you that they cannot help you.



How to persuade them to let you pass



TIP 5: ENGAGE DON'T EVADE

- Don't try to sneak past the Gatekeeper, the chances are you'll get cut off at the knees.
- Actively engage with the Gatekeeper so that they have a positive and friendly attitude towards you when you call again. Don't get too personal, don't pry, but you can gently probe.

How to persuade them to let you pass

TIP 6: EASY DOES IT

- If you are nervous, stressed or tense, they sense it. You will transfer those feelings to your voice, your behavior and choice of words. Smile and confidently greet them with energy and ease.



How to persuade them to let you pass



TIP 7: PLAN, PRACTICE... DON'T SCRIPT.

- Unless you are a good actor, don't use a script on the Gatekeeper.
- Plan your approach depending upon responses that they might make.
- Plan responses to key objections but leave yourself room by improvising the dialogue.

How to persuade them to let you pass

TIP 8: IS SHE EXPECTING YOUR CALL?

- Irrelevant because you want to speak to the DM nonetheless.
- Use the DM's first name only. It sounds like a personal call.



How to persuade them to let you pass



TIP 9: THE LAST BEST SOLUTION

- If you're great at creating memorable voice mails, you can always ask if you can be put through to the Decision Maker's voicemail.
- Point out a benefit for the Gatekeeper of doing this.
 - If they say that the DM is 'out to lunch' or 'in a meeting' and you've already called several times, point out that you've already taken up a lot of their time and ask if they can put your through to voicemail to save bothering them further.

Transform them from
goalie to welcome
wagon



“Do speak to us nicely, we have feelings, and more authority than you can even begin to imagine.

We deal with awkward phone calls and harassment ALL DAY LONG.

We take a lot of abuse from telemarketers, recruiting agencies, irate clients, and occasionally our co-workers.

Ask us how our day is going, how the weather is, etc.

TRY to sound sincere; it can go a long way in helping you get where you need to go.”

How to persuade them to let you pass

- “Telling the gatekeeper who you are calling for is more effective than asking if he's available. Every time we ask a question, we leave ourselves open to hearing "no"...and we get enough of that! “
- Stating that I am calling for the decision-maker reminds me of my purpose, and removes the possibility that I will not get to speak with them. A gatekeeper will hear in my voice that I deserve and expect to be put through.
- With this posture, I have had gatekeepers actually apologize to me if the decision-maker was not available!”



How to persuade them to let you pass

The less formal, the better.

"Hey, is Chris around? Tell him Keith is calling."

If you sound like you know the person you are trying to reach, you have a better chance that the gatekeeper will announce your call.



What are your alternatives to the gatekeeper?

- Company website
 - Management team
 - “About Us”
 - Annual reports
 - Press releases
 - Articles
- Try to connect with target prospects via LinkedIn beforehand
- Sending snail mail letter with promotional product beforehand



What are your alternatives to the gatekeeper?



Why go to the
gatekeeper at all?

Ask for others in...

- RELATED
departments

- SALES

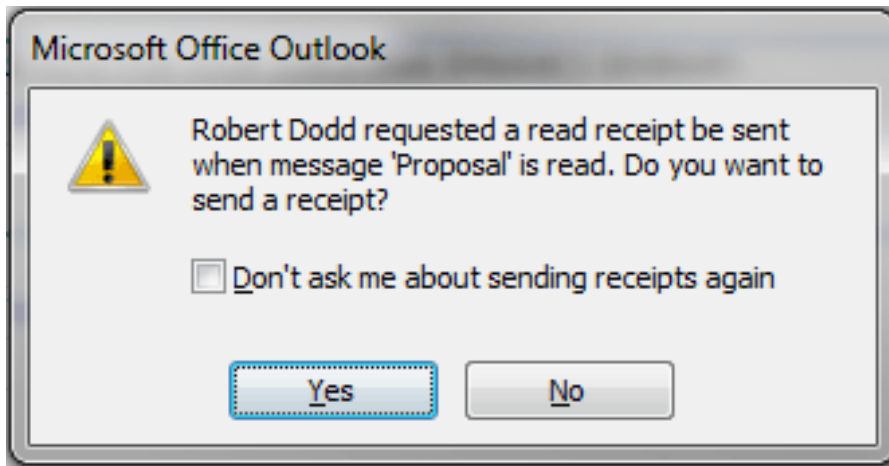
No screen!

Tips from the sales pros



- NEVER, EVER call your best prospects first. Practice on your B or C prospects - ones you can afford to lose.
- Have a voicemail plan AND a real person plan.
- Be prepared for common obstacles, like "We don't need any" or "We're happy with our current vendors." Plan for them.

Tips from the sales pros



- Have an e-mail address? Send a document and attach to it a “read receipt” tag. Leave your Outlook on and open while you work and scan the sent messages. When the message is “read”, you’re immediately notified.
- Dial the phone. Increase your odds of reaching the decision maker live.
- The client has read the message and your call comes within minutes... “quality” dialog time between you and your client = better sales results.

Before you call...

Be aware of how Caller ID displays your company name. “Sell Co.” does not have a chance of making it through. If you block the name of your company with “Private Caller”, I will answer, keep you on hold while I Google the name of your company, and then tell you that no one is available.



Tips from sales pros

If after several calls the gatekeeper still won't play ball, I ask her name and say, *“What are the chances you're going to help me out today?”*



Tips from the Best Sales Pros

BELIEVE THAT YOU WILL BE PUT THROUGH.

To actually achieve a result you need to believe that you can achieve it first. In life, salespeople tend to get what they believe and they don't necessarily believe what they get!



A black and white photograph of a person in a dark suit and shiny black shoes climbing a staircase. The person is positioned on the left side of the frame, with their legs and feet visible as they ascend. The staircase is made of dark steps with light-colored edges. The background is a dark, textured wall.

Tips from sales pros

Remember that a good call is often getting to the next step – another piece of information, intel, a contact, an email. Get what you can on each call.

Tips from sales pros

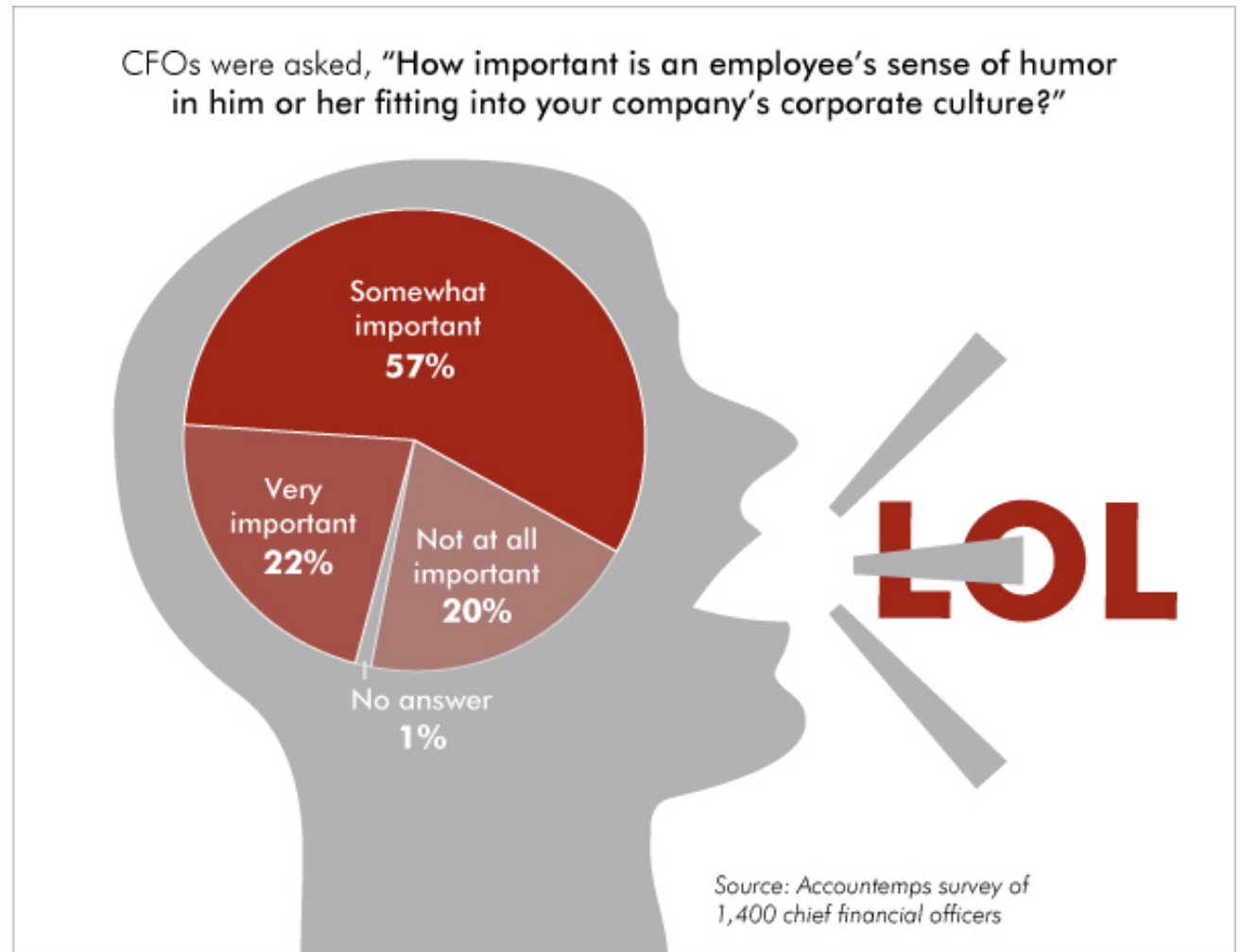


Praise your competition.

- “We’re already working with XYZ Company,” you say,
 - “Great! They’re a really great choice.”
 - “They’ve got some of the best _____ out there. I’d just like to share a few ideas that will augment your current program. “
 - “Many of their customers do business with us as well.”

HUMOR is a universal connector

Laughter goes a long way in connecting with gatekeepers.

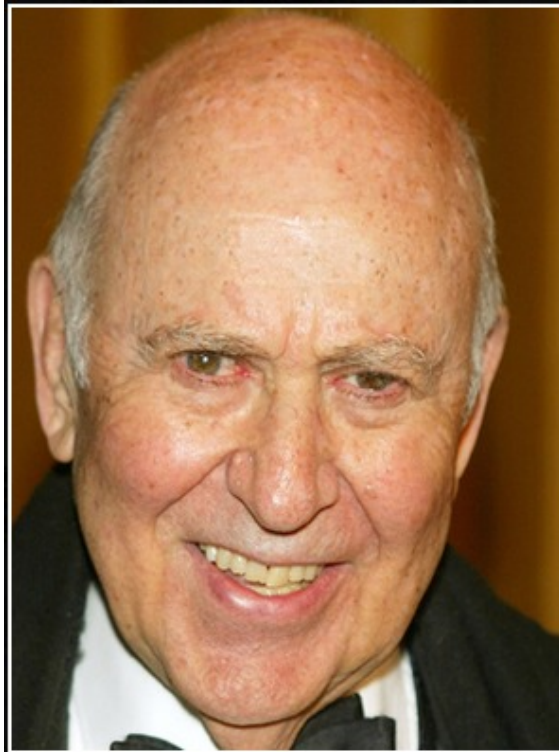


Tips from sales pros

HUMOR

Laugh at yourself.

- Builds trust
- Makes us “the real deal,” authentic



Inviting people to laugh with you while you are laughing at yourself is a good thing to do. You may be a fool but you're the fool in charge.

— Carl Reiner —

AZ QUOTES

Tips from sales pros

HUMOR

If you don't consider yourself funny, watch improv. In improv, you're given an offer by another person. You accept it, then build on it. Instead of changing what the person is saying, you go 'yes and,' which is amazing in a business or sales environment."



What works for you?



Getting Past the Gatekeeper



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