

Strategies for Getting Past the Gatekeepers

Gatekeepers have a difficult role. They are tasked with granting only the right people access to their executive. They have typically developed their own criteria or screening process to help them determine if you are a good risk or not. You must respect the gatekeeper, for he is constantly faced with competing demands. He must limit any interruptions to the executive's day that may be unnecessary or a potential distraction or waste of the executive's valuable time while simultaneously not excluding individuals that the executive would want to meet. How well he interprets his own screening criteria could make or break his job. Once the gatekeeper recognizes that it is in his best interest (or the executive's, or the organization's) to let you in, or if it seems worse to keep you out than let you in, he'll find a way to let you in. Gatekeepers have tremendous power to pave the way for you. Before you chart your battle plan to get past the gatekeeper, consider that this person is not your adversary or foe, but your potential friend. You'd do well to find ways of getting in with the gatekeeper rather than getting past the gatekeeper.

Strategy 1

Avoid the gatekeeper and try to catch the executive. Call when the gatekeeper is not there ... early in the morning before normal business hours or after 5pm or 5:30pm.

Strategy 2

Use first names of both the gatekeeper and the prospect and speak from a confident place, as if you are the prospect's well-known colleague, even if you have never met or spoken to that person before.

Example: "Hi, Mary, is John available?" Or, better yet, "Hi, Mary, this is Ellen calling for John, is he there?"

Strategy 3

Befriend the gatekeeper and have him schedule the appointment for you. This strategy is extremely beneficial once you've sealed the deal with that client, because the gatekeeper can help you to navigate not only the culture of the organization, but the particular nuances of getting things done with your executive client. The gatekeeper who is a really top-notch executive assistant will be your best ally for finding out key information and charting your course through the executive's schedule. Of course, this strategy is the most time consuming because it requires creating the relationship and the associated relational upkeep. It is time well spent.

List the possible universe of gatekeeper reactions to your call. What might he or she say? I've done the first one for you as an example:

- She's in a meeting. May I ask why you are calling? (*Often they will say this even if the person is not in a meeting and could take your call. Don't be offended, the*

gatekeeper is just doing his or her job. They have to balance the right mix of getting things handled and keeping distractions away from the executive they are serving.)

What are some others?

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Now, give your possible responses to the gatekeepers' reactions listed above:

- Maybe you can help me? I'm just interested in scheduling a meeting with her and I'm looking at Tuesday at 3. Can she meet with me then?
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Voice Mail Gatekeeping

Sometimes the gatekeeper is electronic in the form of voice mail. Leaving voice mail messages that get returned can be yet another challenge.

Write the message you currently leave with a prospect when you get their voice mailbox:

Now analyze your message. Was it too long? Did you try to cover too much ground? Did you leave it in the prospect's hands or keep the lead?

Try to keep voice messages as concise as possible. Do not use a voice message to provide a lengthy introduction about yourself or your services. Remember, your whole goal is to set up a meeting to do that. I use a modular approach. I have six basic bullet points that vary from prospect to prospect, but cover the basics.

Here's an example of the modules of a message I leave that has a high percentage return rate. It is very short ... try never to leave a long voice message because you risk that the prospect won't listen to the whole thing if he can't tell early on who you are and why you're calling.

INTRO: “Hi, Tim, this is Suzi Pomerantz. ”

RELEVANCE: “We met at XYZ conference briefly”
or “Max Newell said I should get in touch with you”
or “Jane Cash gave me your name and number”.

PURPOSE: “I’m calling to schedule a time when we might meet in person.”

REASON: “I’d like to find out more about your role and your organization and share with you some of the results we’ve recently produced for a firm like yours.”

PROPOSAL: “I’m looking at Tuesday at 9am”

PROMISE: “and I’ll call you again tomorrow to see if that fits in your schedule.”

Literally, that’s it. Nothing extraneous. Don’t fall into the trap of trying to fully introduce yourself, your business, your services and sell them all on a voice message. It can’t be done. Just let them know you are interested in setting up a meeting and that you’ll call back. This keeps you as the leader of the process and you won’t lose time waiting for prospects to call you back. It also allows you to build trust and prove integrity. If you consistently do what you say (“I’ll call you tomorrow at noon to schedule something”) and you do it (i.e., call them at noon the next day) you are proving you are a person who keeps his or her word. Even if you just leave another message that says “Hi, Tim, it’s Suzi Pomerantz again. It is Wednesday at noon and I mentioned yesterday that I’d call you today at noon to coordinate our calendars. I’ll try you again this afternoon at 5 or you can simply call me and let me know if Tuesday at 9am works for us to get together.” Of course, then you have to call at 5 if you haven’t heard from him. However you space it, keep yourself in the driver’s seat.

Practice Script: Voice Mail Messaging

Okay, now it’s your turn. Take a test run at crafting your own super-short message to leave for prospects whose gatekeepers are their phone mail systems:

INTRO: (introduce your name. if you wish you can include your company name)

RELEVANCE: (remind them where you two met, or whom you know in common)

PURPOSE: (tell them why you are calling today. HINT: to set up a meeting)

REASON: (why are you requesting a meeting?)

PROPOSAL: (suggest a specific date and time)

PROMISE: (say when you will call again, and then make sure to put it on your calendar to do so)

Practice with a partner until you develop a natural message that feels authentic to your style and personality. Seek suggestions from your practice buddy for which messages will most likely motivate return calls.

Write your new message here: