Getting Past the Gatekeeper: 7 Tactics that Set Top Sellers Apart

The greatest barrier salespeople face is the gatekeeper, the person holding the key to the decision maker’s telephone, appointment schedule and office.

Before you can even begin to make a sales presentation, you’ve got to get past this roadblock.

This white paper contains proven ideas to help you get past the gatekeeper. It also includes tactics that can help you turn the gatekeeper from an obstacle into an asset – one who can not only grant you access to the decision maker, but also support your cause: closing the sale.
Gatekeepers can be anyone from executive assistants, public relations people or receptionists. But whatever their titles, one common **misconception** surrounds them: A gatekeeper’s job is to screen out salespeople.

In reality, a gatekeeper’s job is to protect the decision maker’s time.

And it’s your job to help the gatekeeper realize you’re important enough to earn a meeting with his or her boss.

Some salespeople hurt their efforts by thinking of gatekeepers as adversaries. That leads to the costly mistake of treating them like insignificant obstacles rather than important individuals who’ll determine whether you get a chance to reach the decision maker or not.

Top sellers are skilled at aligning themselves with gatekeepers and turning them into allies. Although gatekeepers usually don’t have the authority to make buying decisions, they do have the power to eliminate salespeople early in the call or give them a vote of confidence in front of the boss.

When salespeople view gatekeepers as integral parts of the selling process, they take a major step toward gaining new customers.

**Valuable assets gatekeepers bring to the table**

A big reason gatekeepers shouldn’t be thought of as adversaries is because they have a lot to offer salespeople in the way of help closing the sale.

The most valuable things gatekeepers offer salespeople who are making cold calls:

- **Inside information.** Many decision makers spend a great deal of one-on-one time with their assistants talking shop. As a result, gatekeepers absorb a lot of inside information that could be invaluable to salespeople.

- **Hidden power.** You never know how much power gatekeepers really have. They may not have the authority to buy, but they may have the power to influence the decision maker.
The No. 1 reason they let salespeople pass

So under what circumstances will gatekeepers pass salespeople along to decision makers?

A recent survey tackled that question, asking gatekeepers how they determine who gets through to a decision maker.

The top answer: “People I like.”

While there’s no silver bullet for getting people to like you, there are a number of tactics you can adopt that will improve your chances of gaining passage to decision makers.

These are those tactics:

1. Establish a friendly rapport

If you were standing in the lobby of their office, a gatekeeper would first size you up based on your appearance. He or she would do the same with the way you sound, so it’s important that you don’t sound sloppy, unimportant or as if you don’t respect his or her role in the sales process.

Always use a conversational and confident tone of voice, and act as excited to speak with them as you would be the decision maker.

2. Get their name (and use it)

Early in the conversation, ask for the gatekeeper’s name. Use it on the call, put it in your notes and greet him or her by name on the next call. This will make you seem like less of a stranger on subsequent calls.

In addition, you’ll want to fully introduce yourself. Give the name of your company and the prospect you’re hoping to talk to, as well as any info you have on prior meetings with the prospect – e.g. “We met at a conference last month.”

3. Avoid weak questions

There are weak questions you want to avoid that can give gatekeepers an easy way to push you out the door.

For example:

- Is Mr. Whitman available?
- Is he busy?
- Is he out of his morning meeting?
- Is this a bad time?
- Should I call back?

Each of these can lead to a simple, one-word, instant end to the sales call.

Stronger questions, however, can be a great way to strike up rapport with gatekeepers and gain access to their knowledge of the business.

It’s a good idea to prepare a list of questions you can ask gatekeepers after you’ve explained who you are, why you’re calling and why their boss should talk to you.

Some strong questions:

- Who would I talk to in the company to find out how you’re handling things in this area?
• Do you know if this is an issue your company is concerned with?

• Before I speak to Mr. Whitman, is there someone else I can talk to who can give me a better understanding of your objectives and challenges?

• When do you expect attention will turn in that direction?

• Who else in your organization is involved in this initiative?

4. Treat the gatekeeper like a customer

You’re going to run into gatekeepers who are going to ask what the call is about. Be prepared with answers that won’t make them feel as if they’re shadowboxing with you.

The conversation needs to assure them you’re going to provide something of value for their boss.

Be prepared for ‘the question’

The most important question you need to be prepared to answer: “Is this a sales call?”

Don’t dodge it. Instead, answer with something like, “I don’t know yet. If there’s a fit for what we provide, it might be. Otherwise, it’s not. I’d like to ask Mr. Whitman if we have a basis for further conversations.”

5. Involve the gatekeeper in the sales process

Because gatekeepers have loads of valuable insider information that can help you advance the sale, it may work to your advantage to invite the gatekeeper to review the presentation you hope to make for the decision maker. So don’t be afraid to solicit their insight and advice.

One useful approach: Ask for the gatekeeper’s ideas on the best ways to proceed without wasting anyone’s time.

By involving them in the process, some gatekeepers turn from opponents into advocates, who can become strong influencers in the decision-making process.

6. Tell stories

Gatekeepers pay more attention to stories about the good you’ve done for other customers than to boastful comments about the features of your products or services.

But try to keep stories to 30 seconds or less, and follow this format:

• State the situation

• Describe the action you took, and

• Articulate the results you achieved.

7. Test your introductions

It’s always a good idea to develop two or three compelling introductions and test them with the gatekeepers you run into. It won’t take many encounters for you to begin separating the wheat from the chaff.

Your goal is to eventually develop several dynamite introductions that are interesting and intriguing.

If you run into trouble coming up with ideas for compelling introductions, write down the first thoughts that come to mind as you answer these questions:
• What’s the most unusual aspect of what I do?
  (Think of customers who were pleasantly surprised by what you were able to do and the results you delivered for them.)

• What does your product or service deliver that your competition’s offering can’t?
  (Think of a customer who chose you because of the benefits competitors couldn’t match.)

• What’s your most interesting customer story?
  (Is there an example that would leave the gatekeeper spellbound?)

• What’s your most exciting customer story?
  (Again, what would blow a gatekeeper away?)

• What’s your most dramatic customer story?
  (When have you been able to help a customer solve a difficult problem?)

**Keep your head up**

Use this information to guide you when encountering gatekeepers, and remember: It’s crucial to think of them as people you need to turn into your allies, rather than adversaries you need to dodge.

In reality, you’re both trying to accomplish the same thing: Look out for the best interests of the decision maker. When you make it known to gatekeepers that is your intent, your access to decision makers will improve dramatically.