

How to Work with the Gatekeepers

The Gatekeepers are defined as the people who stand in the way of getting to the decision maker. They can be well-trained to run interference. That's what they have been hired to do. I have been in that role when I was a health care professional and I was among the best at protecting the owner from seeing BD people.

Having been in that role, I have a tremendous respect and appreciation for the work that these people do. Typically, they are very loyal to their bosses. At the same time, BD professionals are seen as an obstacle in their day. There is work to be done, and BD people get in the pathway of productivity.

There are technically three types of gatekeepers in a company.

- The "receptionist" who not only handles DM's calls but all calls to the organization
- The other is the personal admin to the DM
- The electronic gatekeeper

YOU MUST IDENTIFY WHO'S WHO. You need to develop a different approach to for each gatekeeper role.

The "receptionist"

I will tell you here and now to never talk down to these people. For one thing it is just simply rude and word travels fast in the company. The other is you have no idea who that might be and what influence they have with the owner. How do you know who they are? Just because this role may be among the lowest levels in salary gives you no right to treat them any differently.

They are keeping track of the company's phone and foot traffic – this is hard work!

- This includes angry customers
- Nagging BD people
- Vendors
- Answering simple questions
- Telemarketers
- The list goes on...

Their time is short.

- They are trained to take messages from strangers
- They do not have tons of time to talk
- They are too busy and often overburdened with work

Never ask to speak to the decision maker directly, ask to be put through to the assistant directly responsible for the decision maker. Do your research in advance and aim to specify this person by name. Go to the website to research the first and last names of employees in the organization.

Never ask to be connected – instead – firmly (and very politely) say “please connect me with _____ in Mr. / Ms. Decision maker’s office, thank you.”

Instead of please – **thank you** implies action.

Try it on for size: Use your current situations and repeat the above sentence using the correct names for the gatekeeper and the decision maker. Keep doing it until you can hear the confidence, firmness and politeness necessary for success.

Next, go try it out in a real prospecting call...

And our all-time favorite: “Can I take a message?”

“Sure, it is quite long and will probably take a few minutes, or you could connect me with (admin’s name) and I could give him/her the message.

The decision maker’s gatekeeper:

These people often know more about running the company, the problems in the company etc. than many decision makers do. I am not trying to be condescending about the decision maker at all here. There can be visionary decision makers who need people like their gatekeeper who are very operationally and analytically focused. They are a tremendous asset to the company and owners will move heaven and earth to keep them.

They can be like Fort Knox trying to get to. They can be your best friend (and should be) or your worst enemy. It is all up to you and how you treat them – to which above relationship you end up in. I have seen employees in a firm treat this gatekeeper poorly and the chances of them getting into the decision maker’s schedule were slim to none. I, however, was polite and respectful because I understood and appreciated the work that she did. If I needed to get into the owner’s office, I had no issue....and I never abused that privilege.

What can you do?

When you reach this gatekeeper, open with what you were going to say to the decision maker. Treat this person as if they are part of the BD process. Ask them what they think should happen next. Seek to build a relationship with this person in the same way you would build a relationship with a decision maker. BE SINCERE! They can smell insincerity a mile away.

The electronic gatekeeper (voicemail):

I know how I feel about voicemail in the BD process. It can be very frustrating. Remember, there is someone listening to the voicemail at the other end and the last thing you want to do is to leave your tone of frustration as your first impression. You only have one slim chance at a good first impression, especially in voicemail.

Need to put the decision maker in the position of “this person and their ideas are different, I want to know more.”

How can you do this?

- Your message is delivered with (sincere) enthusiasm (real), passion, and certainty
- No “winging it” – there must be a pre-call plan for this
- No more than 30 seconds with the most important information in your first sentence
- Practice before live delivery
 - Introduce yourself
 - State how long the message will be (time yourself as an average – no one likes terminal voicemails of several minutes long – if not forewarned, usually are deleted half-way through
 - Reference the name of the referral resource (if applicable)
 - Reference the letter and hook (if applicable)
 - State the purpose of your call
 - Suggest a limited time frame for your live meeting
 - Give your telephone number with area code – slowly using pauses between area code, and the first 3 numbers and last 4 – repeat
 - Thank the person

I will close with some of my stories of when I needed to lock Fort Knox up tight.

- The BD person said they would only take five minutes with the decision maker. I granted access. Fifteen minutes later, they were still talking. I had clients (patients) waiting in rooms who were cold, tired, nervous, angry, hungry, and late for their next appointments. This person never saw my boss again.
- The BD person came on to me in a flirtatious way as a maneuver to get in to see my boss. Called me “honey” and “sweetie pie” too. Guess what happened here?
- The BD person showered me with all sorts of goodies....candy etc. Then disrespected the time boundaries that I granted with my boss. My focus is customer service not getting free stuff. Same result, Fort Knox!
- A BD person stormed past me as if I was invisible to get to the owner. I didn’t have to take care of that one....the owner did.

I wish you success!