

Get the Gatekeeper on Your Side – and Get Results

This article appeared in OHR Tracker, Fall 1999.

Author: Carolyn Merriman, president

How many times have you picked up the phone to call a prospect – or maybe a client – only to reach the “gatekeeper”? You know this person. The administrative assistant whose job it is to screen all calls. A protector of the fortress, if you will. In order to be successful in selling your service, you also need to sell the gatekeeper. After all, this person is an invaluable ally in your quest to reach your contact. Here’s a list of quick tips to make this important relationship work:

1. Have a Reason to Call

Express a legitimate reason to reach your target or get the information you need. “Dr. Smith suggested I connect directly with you” or “My administrator suggested Dr. Smith would be a good person to discuss this with.”

2. Know What You Want

Do you need 10 minutes of the decision-maker’s time? Do you want to get on that person’s schedule for next Tuesday? State your purpose pleasantly and professionally and you’ll be more apt to get what you need. Let the gatekeeper believe that if you don’t get through, she’s done something inappropriate. Gatekeepers take their jobs seriously and are there to make sure the right people get to talk to the boss.

3. What’s in it for Me?

Look at your call from another point of view and think of an outcome that truly benefits the gatekeeper. Respect this person’s position, allow him to control the schedule and respect that he – not you – decides what’s important. If you can help him be the hero, you’re not a problem – you’ve become a valuable ally.

4. Tune into Clues

Verbal clues mean a lot. Is this person emotional (listen for lots of adjectives, big words, demonstrative phrases or control words) or analytical (“send me something on paper and I’ll talk with my boss)? By really listening, you can tailor your questions or responses in a way that matches the gatekeeper’s kind of language and style.

5. Mind Your Manners

Gatekeepers are your ticket to the top. Give them the courtesy they deserve. Be polite when you call and be concise. Try saying “thank you” at the end of your request. “This call is in response to a seminar I attended by Ms. Kennedy. Thank you.” It puts closure to your statement and puts the ball in the gatekeeper’s court.

TIP

Sometimes it is possible to reach your contact without having to go through the gatekeeper. Try calling at off times – between 7 and 8:30 a.m., at the lunch hour or after 5:30 p.m. Decision-makers often answer their own phones at these times.

6. Be Respectful

Ask the gatekeeper if this is a convenient time to talk. Give her the option to put you on hold briefly or call you back. Call this person by name (and note it for future calls). Treat her with respect and understand she’s simply doing her job.

7. Give Ownership

A lot of gatekeepers are doers – they’re process people and like to check things off the list. Ask for the gatekeeper’s help in achieving your reason for calling. Requesting assistance makes the gatekeeper feel responsible for the outcome of this call. Position that you’re both working toward the same outcome.

8. Learn the Rules

Tailor your call to the gatekeeper’s business style. A tough gatekeeper will tell you he’s in charge of the calendar and can’t make an appointment until his boss authorizes it. So use language that puts him in charge. “She’s asked that I follow up with her. How may I best do that?” or “How can you help me follow-up after I send something?”

9. Build a Relationship

You never know when the gatekeeper may be a prospect down the road. By staying in touch with this person and recognizing her assistance, you’ll gain her respect and access to the prospect – and maybe her business some day.

In Summary

With all the help we get from gatekeepers, it’s especially appropriate to recognize their good work. When you encounter an especially helpful, professional assistant, say “thank you.” Take time to write or fax a note showing your appreciation. Compliment their efforts to their boss. After all, it’s the gatekeepers who truly make or break our business!



Carolyn Merriman, FRSA, President, Corporate Health Group,
www.corporatehealthgroup.com, 1-888-334-2500