How to Get Past the Gatekeeper

It’s a common occurrence. You pick up the phone to schedule an appointment, or plan a visit, with the prospective physician customer only to be faced with the “gatekeeper.” This person has the job of screening all calls, protecting the fortress and dismissing those who aren’t appropriate to allow to the next level. To be successful at selling, you also have to sell the gatekeeper—convince them that you and your products or services are worthy of consideration.

In her book SNAP Selling*, Jill Konrath writes a letter from a prospective customer detailing why the customer is overwhelmed and stressed. In short, the letter describes someone whose well-planned day is destroyed before 9 a.m. by an urgent project, whose new product isn’t going to be ready and who receives hundreds of phone calls and e-mails each day, putting her further and further behind. Basically, she’s in no position to be interested in nor does she have the time to hear a sales pitch about a product or service that doesn’t focus on her business objectives. She’s just trying to survive.

As Konrath points out, this prospect will only talk to you when you’ve got a solution she needs — something that will make her life easier and her business more successful. You’ve got to have a valid reason to reach your prospect or, at a minimum, get the information you need. Valid reasons are more than the fact that they are on your prospect list or you think they need your services — it’s about something you have that they will find value in because it is focused on them and their business challenge.

* written by Sales Expert, Jill Konrath Make sure you check out her free sales resources at…http://www.jillkonrath.com/sales-resources/

Valid reasons might include:

• A reference point. Work to position your credibility and value by using someone’s name as a reference point, such as “Dr. Smith suggested I call Dr. Jones," to help convince the gatekeeper of your worthiness.

• A specific request. Be prepared and let the gatekeeper know exactly what you want, whether that’s 10 minutes of the decision-maker’s time or an appointment next Tuesday. State your purpose pleasantly and professionally, and you’ll be more apt to get what you need.

• An outcome. Look at your call or visit from another point of view and think of an outcome that truly benefits the gatekeeper, not just the physician. Respect this person’s position, allow her to control the schedule and respect that she—not you—decides what’s important. If you can help the gatekeeper be the hero, you’re not the problem. Instead, you’ve become a valuable ally.

Be polite, warm and engaging—and above all, treat the gatekeeper with respect. Recognize that this person has a job to do, and sometimes it’s a tough one.
Tailor your call or visit to the gatekeeper’s style. Listen for verbal clues that can help you assess the gatekeeper’s style. Are they emotional (listen for lots of adjectives, big words, demonstrative phrases or control words) or analytical (ask for data to support your value claim, a letter from the referral source opening the door or risk averse by saying they’ll talk to the physician)? By really listening, you can tailor your questions or responses in a way that matches the gatekeeper’s comfortable language and style. Acknowledge their workplace culture and how they are asked to manage the office and scheduling.

Be respectful and give gatekeepers the courtesy they deserve. Ask if this is a convenient time to talk and be concise in your request. Give her the option of putting you on hold or calling your back. Call the person by name and note it for future reference. When you do get through to the decision maker, be sure to mention the gatekeeper by name and complement her helpfulness and professionalism. If you’re calling in person, be prepared when you approach their work space by having your business card in your hand and your calendar ready.

Plan for how you will ask for the appointment and how you will manage the objections or issues the gatekeeper brings up. Remember Vendors don’t do this. If you stumble or overload them with information responding to the most innocent question—“What is this regarding?”—you can hurt your chances of getting in to see the decision maker.

Give the gatekeeper ownership of helping you achieve your goal. They are typically process-oriented people and like to check things off their list. When you ask for their help, they feel responsible for the outcome of the call. Position that you are both working toward the same outcome. Ask how she might help you follow-up to achieve that outcome.

Using a sense of humor or an empathetic voice also can be helpful but demonstrating the WIIFM (What’s In It For Me?) method usually works best with the gatekeeper. Give the gatekeeper credit for her role by saying, “Mary, you understand Dr. White’s needs more than anyone so you can see how she’d benefit from knowing about our new nurse navigator program. Can you help me find a way to have 10 minutes of her time so she can see the greatly improved outcomes AND how much time it will save?”

Recognize objections as opportunities. It won’t be smooth sailing every time. Prepare yourself for roadblocks so you can professionally respond to them and manage them. Consider these common gatekeeper objections and counter-responses:

**Objection** – “We don’t schedule appointments for people like you. Just come on Tuesday at 3. It’s first come, first served.”

**Response** – “I can appreciate that you’ve had to do that with Vendors. I’m coming from St. Mary’s and my Vice President of Medical Affairs has asked that I work with Dr. Appleby on reviewing the proposed surgery schedule. I have slots this week and next. What will work on his calendar?”
Objection – “The first slot I can give you is Wednesday, September 20. Bring lunch. We like Thai and, oh, by the way, some of us are on a diet, so bring South Beach for four.”
Response – “Thanks for the suggestion. But I’m coming from St. Mary’s and as a not-for-profit hospital we don’t provide lunches. We offer them when our surgeons provide educational presentations to other physicians. For right now, I’m looking for 10 minutes just with Dr. Black. I can meet with her on Tuesday or Thursday. Does either of those work?”

OR, if you absolutely have to provide a lunch to even get your foot in the door: “Mary, while we don’t do lunches normally, I can do it this one time. However, in order to make sure the lunch presentation meets the physician’s needs, can I meet with one of the physicians for 10 minutes to help me better understand the practice needs and how this presentation can benefit them?”

Harvey Mackay writes in his book, Swim with the Sharks Without Being Eaten Alive**, that as CEO of his company he ranks the following two positions as the most key in generating revenue for any organization:
1. Vice President of Sales
2. Office Receptionist (also known as the gatekeeper)
Mackay’s hierarchy clearly demonstrates the need to build a relationship. You never know where that person might end up in this practice or another setting. Stay in touch with the person, recognize her assistance and give her the respect she deserves. You’ll gain her trust and maybe her business some day.

**Reprinted with permission from nationally syndicated columnist Harvey Mackay, author of the New York Times #1 bestseller “Swim With The Sharks Without Being Eaten Alive.”

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THOUGHT’S TO CULTIVATE:

Gatekeeper 101 Etiquette

1. Build a respected and appropriate relationship with the gatekeeper.
   Acknowledge that they have a job to do and remember what they may be doing as you interrupt their day. Always be polite, listen for their name, tone and personality, and help them help you. Be clear in saying what you need, then listen and let them process. When they help, thank them and make sure to meet them when you’re there. Remember, you’re only selling yourself to this person.

2. Understand the cycle of the practice.
   Make sure you aren’t calling or visiting at peak times. If it’s a pediatric office and it’s January, don’t call on a Monday morning when all the sick kids and worried parents from the weekend are calling for prescriptions or appointments. While Monday morning might be great for you, it’s usually an awful time to call any office for an appointment. Try to call starting Monday afternoon, or odd times of the day. If you’ve been to the office before, observe the peak versus quieter office schedules.

3. Do your homework before you meet your prospect.
   Pre call plan for them just as you would the physician. Visit the lobby, gather marketing materials, and talk to insiders to learn about what your organization has already done with them in the past. Think strategically about what you’d like to learn from the customer, how you’re going to ask questions and what need you believe they may have that your organization can satisfy.

4. Give the gatekeeper ownership.
   If the gatekeeper is all about controlling the situation, involve them. If it’s appropriate, go ahead and meet with them as well. Be assumptive and practice using this approach in your request for the appointment. Instead of “if,” ask for “when.” Focus the gatekeeper on the calendar, not on saying no to the appointment.

THOUGHT’S TO CULTIVATE:

Talk Isn’t Cheap so Don’t Ignore Voice Mail

How many times have you geared yourself up to make the call only to be greeted by a voice mail message? Suddenly you clam up, forgetting how you were going to respond when a live person answered the phone and stammering through the first five to 10 seconds of your message. Voice mail can be your friend when you consider these key points.

• Tone – The recipient of your call can tell a lot in the delivery of your message. Are you upbeat, positive and friendly without being overbearing? Does your voice smile?
• Time – The length of your message can drive the recipient to action. Do they delete quickly because you are wasting their time rambling on about your service or they are intrigued by how respectful you are of their time by leaving a focused and concise message?
• Tenacity – The line between being determined and becoming a pest is a very fine one. Does your message acknowledge their busy schedule, your previous message and what your next step is?
• Task – The message you leave needs to be clear about the task at hand. Is the next action—and the benefit of that action—clear to the recipient?
• Two Times – The most important thing you can say is your name and number, and say it twice. How often have you had a voice mail message that you listened several times trying to figure out the caller’s number?