

Beyond the Gatekeeper

HOW TO BREAK THROUGH THE BLOCK

When gatekeepers have their way, they reduce all salespeople to vendors hawking products or services. Say, for example, you work for a computer company. Typically, a gatekeeper will expect you to sell computers. This means dealing with IT managers, reacting to opportunities or responding to bids for computers.

“A man is literally what he thinks.”—James Allen

What do you think you are—a vendor or a business resource?

Is this where you want to be? Probably not. You would rather be dealing with line executives, learning about real business problems so that you can proactively propose *business solutions*. You want to sell value and help customers solve business problems. But gatekeepers try to prevent you from solving business problems or selling value. Their focus is on finding cost savings, not on making strategic investments.

Here’s another example. If you’re a sales representative for a chemical manufacturer, do you sell chemicals, or do you help customers increase and improve their own customer service? A company that buys chemicals probably wants to know about formulations, prices, availability, etc. You, on the other hand, want to provide solutions to help your customers service their customers better.

One company we worked with sold fiber to tire manufacturers. Because their fiber made up only 0.5 percent of the cost of goods sold of their customer’s tires, many of the company’s reps didn’t feel they were worthy of getting to decision makers. Those reps were acting as their own gatekeepers. Happily, a few thought differently, and they changed the way the whole organization sold and whom they sold to.

Beyond Selling Value means that you can't take no for an answer when it comes to getting to the decision maker.

Throughout this chapter, we'll expand on these examples, each time coming back to this crucial question: how do you sell? To sell value, you need to sell to the decision makers, who are interested in big-picture business improvements. When you sell products, however, you're selling to gatekeepers, who are only interested in buying products.

SO WHAT IS A GATEKEEPER?

Of all the issues sales reps face, gatekeepers may be the most emotionally frustrating and professionally challenging. Gatekeepers are probably the number one cause of insomnia among sales professionals. While getting to the decision maker sounds straightforward, we know that in reality, it's a serious challenge. Beyond the right access strategy, you need to know how to go around or over gatekeepers or even work with them. This is how you get to decision makers, the people who can say "no" when everyone else says "yes" and can say "yes" when everyone else says "no."

"I make the decisions around here" and "Let me run that up the flagpole for you," are the watchwords of today's gatekeepers.

As frustrating as they may be, gatekeepers also provide salespeople with an opportunity for creativity, because each gatekeeper you face will be different from the last. They come in all different shapes and sizes and with many personalities.

Naughty and Nice

Sometimes, gatekeepers are antagonistic and rude, letting us know that they intend to block us. They say things like, "I make the decisions around here," "You don't need to talk to anyone else," or "I don't want you talking to anyone else." Others seem friendly, as if they truly want to help. They might say, "Hey, let me run that up the flagpole for you," "I'll take it from here," or "I'll let you know when the right time to proceed is."

Have you ever left a sales call with a smile on your face, gotten into your car, and driven away only to realize, "Hey, that guy blocked me!" He just did

it in a really nice way. Regardless of whether they wear a friendly or hostile face or whether they act open or chatty, they're all gatekeepers because they want to block and control you.

The Gatekeeper Defined

From a broad perspective, a gatekeeper is anyone who keeps you from executing your sales strategy and getting where you want to go. Gatekeepers like to block you from gaining access to other key players, especially decision makers. Typically, gatekeepers can say "no" but can rarely say "yes."

Gatekeepers can say "no" but can rarely say "yes" to a value-oriented relationship.

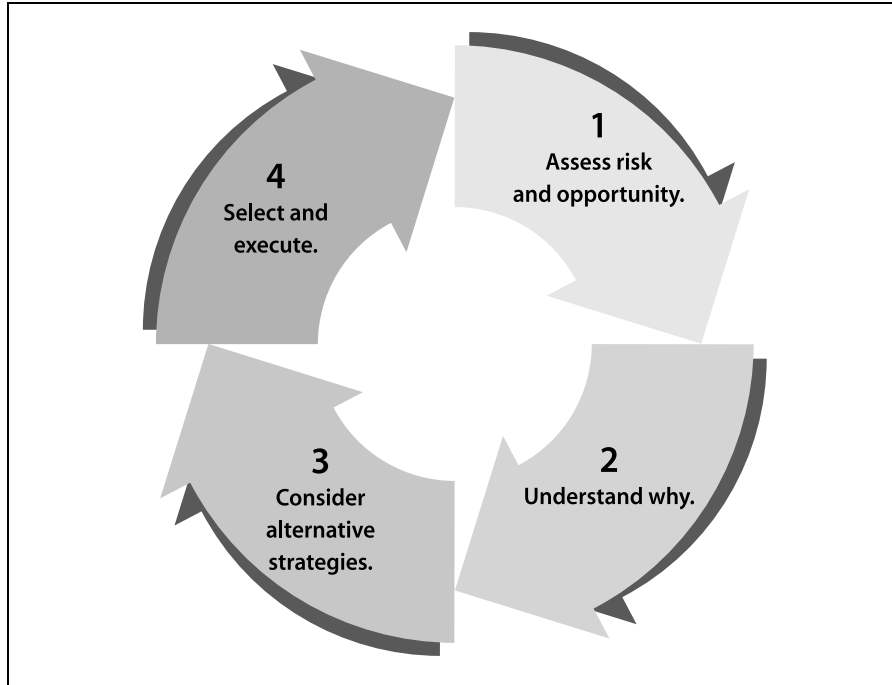
While gatekeepers are not always immediately identifiable by their job titles, many are purchasing agents or product evaluators. Often, you will be told that someone is "the person you need to see." For example, if a rep who works for a components manufacturer is told, "You need to see Dan; he buys components," you can be pretty sure that Dan is a gatekeeper. His job is to evaluate and purchase components, so when you call on him, you can expect to be evaluated just like every other rep selling components—on price, product, availability, terms, discounts, your company's strengths and weaknesses, etc.

Gatekeepers exist in all areas of life, even when you least expect them. A consultant in the sales training business was dating a woman and had never met her parents. After dating for six months, the couple decided to drive a considerable distance to meet her parents for dinner. Throughout the drive, the consultant thought about what to say to make a good impression. As soon as the four of them sat down to eat, the father looked at the consultant and asked, "So, what do you do for a living?" Before the consultant could share his carefully considered and measured response, the young woman interjected, "Oh, Dad, he teaches salespeople to get around purchasing agents like you." Needless to say, the rest of the meal was less than enjoyable.

A business executive we worked with told us that when his salespeople were blocked by gatekeepers, between 90 to 95 percent of the time, the reps just accepted the block. This, he said, was the primary reason he'd brought us on board—to help his people learn effective methods for dealing with gatekeepers.

This concern is common among our clients. Yet most available sales books offer little to no coverage of this topic. As a result, even highly skilled

FIGURE 9.1 Four-Step Process Wheel



salespeople can become easily frustrated and feel powerless in the face of a gatekeeper's block.

Guard against becoming your own gatekeeper. Often, by assuming there is a block, we limit ourselves by failing to ask the right questions.

A FOUR-STEP PROCESS

Now that we've identified the problem, let's dive into the four-step process for dealing with gatekeepers. Like other elements of this process, this strategy is based on the methods successful salespeople practice by instinct. We've fashioned those methods into a reproducible system to help others achieve similar results. The four steps in the process are shown in Figure 9.1.

Note of caution. Before taking the first step toward dealing with gatekeepers, bear in mind that in today's selling environment, fewer people than ever can say "yes" to a value-oriented relationship with your company,

“The harder you work, the harder it is to surrender.”—Vince Lombardi

You’ve worked hard to get to this point. You’ve got a good story to tell. Don’t surrender lightly.

while more can say “no.” The goal, therefore, is to find those senior managers who can say “yes” and to develop business relationships with them, while minimizing your vendor relationships with gatekeepers.

Also, remember that gatekeepers can be cagey. Like wooden targets on a police practice range, they can pop out of nowhere, forcing you to react. Unlike the crooks and bad guys on the range, however, gatekeepers do not wear masks or wave their guns menacingly. They’re more subtle than that. But whether your contacts act hostile or friendly, if someone tries to block your path, you know you’re dealing with a gatekeeper.

Step 1. Assess the Risk and Opportunity

As we begin the four-step process for dealing with gatekeepers, remember the Woody Allen quotation: “Eighty percent of life is just showing up.” At this stage, 80 percent of the opportunity is just thinking it through and continuing the effort. Remember the business executive who said that 90 to 95 percent of his reps walked away from opportunities when gatekeepers blocked them? Well, this is the point where you say, “I will not go quietly.”

“I will not go quietly.”

You’re going to do more analysis. You’re going to test yourself. You’re asking, “Should I be taking this farther?” You’ll compare the opportunities associated with challenging this block to the potential negative consequences. Merely by taking these steps, you are already going beyond the limits most sales reps impose on themselves.

Two questions. The key to knowing whether to continue with an opportunity despite a block lies in asking yourself the following questions:

- What can I gain if I successfully convert or challenge the person who is blocking me?
- What are the consequences if I challenge the person who is blocking me and I am not successful?

The answers to these questions will help you build a business case for making this decision.

Time for T-chart. The next step is to create a T-chart with the answers to these questions on either side of the chart (see Figure 9.2). On one side of the chart's top, put a plus sign, and on the other side put a minus sign. Next, brainstorm all the opportunities and risks associated with challenging this block. On the plus, or opportunities, side write down all the potential benefits. These may include:

- Winning the business
- Increased sales
- Bonus money
- Recognition
- Commissions
- Reputation
- Development of a reference account
- Future opportunities for cross-selling
- Promotion
- Opportunities with other business units and companies
- Strengthening your overall value positioning with the company

On the negative, or risk, side write down all the possible negative consequences. These may include:

- Making the gatekeeper mad
- Losing the business (current and future)
- Damage to reputation
- Alienation of the gatekeeper who might then be out to get you
- Gatekeeper moving to another company and becoming an adversary there
- Personal credibility
- Additional selling time
- Opportunity costs

Again, these are just some of the minus factors you may consider.

We cannot stress enough how important it is to take out a piece of paper and write these answers down on an actual T-chart. As anyone who has taken a goal-setting seminar or class knows, a key to successful goal achievement is writing down your goals. The same is true here. In the five minutes it takes to write out the business case analysis, the answer typically becomes very clear.

FIGURE 9.2 T-chart

<i>Pros</i>	<i>Cons</i>
<i>Revenue</i> <i>Commission</i> <i>Quota – 100% club</i> <i>Recognition</i> <i>Additional</i> <i>Opportunities</i>	<i>Reputation</i>

What are your risks and opportunities? Don't just think about it, T-chart it.

Now that you have your T-chart down on paper, you probably have a much better feel for whether the pluses outweigh the minuses. This will determine whether you decide to challenge the gatekeeper or accept the block. Either conclusion may be the correct course of action. Let's take a look at some of the scenarios you likely will encounter.

Conditions of the block. In some situations, you may be blocked but have nothing listed on the minus side of your T-chart. In that case, going forward is all upside with no drawbacks. This situation would probably arise if you were working on a new account where you have little or nothing to lose. In that case, such factors as opportunity for revenue, commission dollars, bonus, or recognition far outweigh any potential concerns associated with being blocked—particularly if you consider this customer a stretch opportunity anyway.

"I miss 100 percent of the shots I don't take."—Wayne Gretzky

Other times, you may be blocked but have a significant established customer relationship you don't wish to jeopardize. In this case, the legitimate risks may well outweigh the potential upside, and you will probably accept the block (see Figure 9.3). Again, either conclusion may be correct; it's just important to go through the process to make sure you're arriving at the right course of action.

FIGURE 9.3 T-chart

<i>Pros</i>	<i>Cons</i>
<i>Revenue</i> <i>Commission</i> <i>Recognition</i>	<i>Loss of install base</i> <i>Delay of key project</i> <i>Loss of revenue stream</i> <i>Loss of the account</i>

The T-chart and business case analysis will help you determine whether to give an opportunity your best shot.

Step 2. Understand the Gatekeeper's Motivation

Think about all the times you've run into a gatekeeper. Now ask yourself, "Why was I blocked?"

To figure out "What?" ask yourself "Why?"

Undoubtedly there have been many reasons. But answering this question is critical to the four-step process for dealing with gatekeepers. To determine the best strategy, you must first try to understand the gatekeeper's motivation. How many of these different gatekeeper motivations have you run into?

- *The gatekeeper doesn't want to lose control.* For any number of reasons, the gatekeeper fears losing control of the decision-making process, which may lead to diminished power and influence within his or her company. It could also result in a final decision that the gatekeeper doesn't agree with, especially if you're selling value while your competitors are just selling products. For this reason, many gatekeepers try to maintain tight control over their spheres of influence.
- *The gatekeeper feels threatened by your contact with others in the organization.* Often, a gatekeeper doesn't know how others within an organization might feel about you, your company, and your solutions. If these key players already harbor negative perceptions about you or your company or are unimpressed by your approach, the gatekeeper runs the risk of looking bad in colleagues' eyes.

- *The gatekeeper is just “doing their job.”* In some cases, gatekeepers may feel their job is to protect the decision maker’s time by blocking “unimportant” people and taking care of lower-level decisions. Executive secretaries and administrators often fill this role. Consider a less obvious case, like the situation we experienced where a manager wanted to “protect” his boss and ended up trying to shield him from us and our efforts. But once we broke through and the decision maker got on board, the gatekeeper became one of our best coaches.
- *The gatekeeper fears that you will make a bad impression.* It’s possible that the gatekeeper thinks you’ll fail if given an opportunity to be in front of the decision maker. In this scenario, the gatekeeper is staking his or her reputation on you and your performance, and a poor showing could make the gatekeeper look bad to upper-level management. As a result, the gatekeeper retains control by limiting your access.
- *The gatekeeper prefers the status quo.* Staying within an existing comfort zone is the simplest thing to do, especially for a gatekeeper whose motto is, “Don’t rock the boat.” A value-oriented decision might result in considerable change and additional work for the gatekeeper. The kind of people who avoid change at all costs make for formidable gatekeepers.
- *The gatekeeper doesn’t understand the value you bring.* This is a rational situation. This gatekeeper may believe the competition has a superior solution or be uneducated about the value your company and solutions could provide.

Like it or not, the reason most gatekeepers block you is because they want you to lose.

- *The gatekeeper wants you to lose.* It’s quite possible that the gatekeeper simply wants you to lose and your competition to win. What if the gatekeeper’s sister sells for your primary competitor? Chances are, no matter how good your people skills and relationship-building talents are, you’ll never convert that hard-as-concrete block. Or perhaps the gatekeeper has been dealing with one of your competitors for years and has a terrific business relationship with them. Again, the gatekeeper may simply want to maintain this existing relationship. Or, unlikely as it may seem, maybe this particular gatekeeper just doesn’t like you or your company.

For obvious reasons, many of these issues will strike an emotional chord with gatekeepers. In fact, emotions will frequently drive gatekeepers’ deci-

sions, not sound, rational business judgment. The most common emotion affecting gatekeepers' decisions is fear—fear of losing control, fear of creating more work, fear that you may make a poor impression, or fear that you might win when they want you to lose. Dealing with a gatekeeper may be a highly emotional situation.

The rational versus irrational gatekeeper. This brings us to the important distinction between a rational block and an irrational block. Let's say a gatekeeper is blocking you because she has been receiving tremendous service from a current supplier and feels good about the strong value-oriented business relationship that exists. In this case, she is being perfectly rational in blocking you. There are ways for you to deal with this situation. Perhaps you could win in another area and gain a foothold with this customer without threatening the relationship the gatekeeper has established with your competition.

Rational blocks can be dealt with through rational solutions. Irrational blocks, however, offer different challenges. What if the gatekeeper doesn't like your gender, your nationality, the color of your skin, or your religion? If you are unfortunate enough to encounter any kind of prejudice, you need to acknowledge that you're dealing with an irrational block and reevaluate your strategy accordingly.

Let's look at some examples of irrational blocks. What if you come across a gatekeeper who was once fired from the company you work for? Do you have any chance of converting that person and having him like you or your company? Probably not. What if this gatekeeper just doesn't like working with people your age? He either prefers older, more experienced people or younger, more energetic people (with Murphy's Law in effect, it will likely be whichever age you're not). Would you be able to convert this block? Not likely. Would it be worth investing your time to try? Again, probably not. Faced with an irrational block, you will generally be pressed to consider different strategies.

Sometimes, the block is emotional or irrational. It may not be worth the time to fix it.

Hopefully, you haven't found yourself in the situation one of our clients faced, dealing with a gatekeeper who was receiving illegal kickbacks from the competition. These situations are very emotionally charged and difficult to get around, because you're not willing to play the same game.

Now that you've taken the first two steps to dealing with gatekeepers—assessing the opportunity and understanding the gatekeeper's motivation—it's time to consider which strategies to apply to the different scenarios.

Step 3. Consider Alternative Strategies

In step three, we have the opportunity to brainstorm a list of alternative strategies to deal with gatekeepers. Now it's particularly important to think outside the box. As we consider these various strategies, let's first go through the three potential gatekeeper scenarios you're likely to encounter:

1. You are not actively blocked today.
2. The threat of a block exists.
3. You are actively blocked.

You may have already developed a set of favorite gatekeeper strategies. If so, that's great. Your previous experience and the lessons learned by peers and managers should always guide your decisions. Let's consider some different strategies for the first scenario.

Scenario 1: You are not actively blocked. If you are not actively blocked, now is the perfect time to start thinking about the possibility. By proactively dealing with a potential gatekeeper situation, we can anticipate future challenges and deal with them before they become too troublesome.

"If you are out of trouble, watch for danger."—Sophocles

Strategy 1. Get to the decision maker early. Remember, the decision maker is the person who can say "yes" when everyone else says "no" and can say "no" when everyone else says "yes." By getting to and developing a relationship with this key executive, you've effectively neutralized almost any potential gatekeeper.

Think about times when you've had a solid relationship with senior-level management. Was anyone able to step between you and the decision maker? Probably not. That's because you had the opportunity to demonstrate the value of a business relationship between your company and the customer. This is the idea behind this strategy—get to the decision maker, establish the value of a business relationship with you and your company, and position yourself as a business resource.

If you can accomplish these goals, it will be virtually impossible for anyone to commoditize you or ensnare you in the Vendor Trap. Of course, this requires you to do a knockout job with the decision maker when you do get the opportunity. We'll talk more about that shortly.

Strategy 2. Assume you can't be blocked By being assertive and assumptive, which means you assume you can't be blocked by any gatekeeper, you position yourself as a competent and confident sales professional. When you exude this confidence, it's difficult for anyone to try to block you.

Gatekeepers are often insecure—insecure about their role, their position, and their strength in the organization. When confronted by someone as secure, positive, and assumptive as you, gatekeepers may shy away and let you pass unhindered. You need to carry yourself in a way that communicates, “I can't be blocked. I sell value. I sell business solutions, and nobody can put me in a box. You can't commoditize me because you can't commoditize value.” With gatekeepers, a little attitude goes a long way.

Strategy 3. Identify potential gatekeepers ahead of time. In your research activities, try to determine who in the organization may benefit by blocking you and limiting your success. By proactively identifying future gatekeepers, you put yourself in a stronger position to utilize Strategy 4.

Strategy 4. Avoid potential gatekeepers until the presentation is scheduled and presold. Ideally, you would like to gain access to the decision maker, schedule a business presentation meeting, and presell the meeting so that it can't or won't be canceled. Then, shortly before the presentation meeting, you can approach any potential gatekeepers and involve them in the process. By coming from a position of strength, with the presentation already scheduled, you are much more likely to get the gatekeeper on board with your solution.

In summary, if you're not actively blocked today, now is the best time to start thinking about your options and how to deal with any gatekeepers that may crop up. Too often, we take situations for granted and later regret that we didn't act sooner. Instead of being complacent, be assumptive and positive, assume you can't be blocked, and get to the decision maker. This is the best way to proceed when you're not actively blocked.

Scenario 2. The threat of a block exists. If you sense a gatekeeper situation looming on the horizon, consider the following strategies:

Strategy 1. Don't assume you're blocked. How many of us have acted as our own worst gatekeeper, assuming that we're supposed to work with certain contacts even though no one has told us so? Don't fall into the trap of being your own gatekeeper.

Strategy 2. Assume you can't or won't be blocked. As in Scenario 1, be positive and assumptive. Consider it your job and responsibility to sell the value of a business relationship with your company, one that can't be sold through

normal product channels. Don't ask permission from potential gatekeepers; instead, use assumptive language like, "I must gain access to Brian Callaway, and I would appreciate your help." When you're positive and assertive, it's very difficult for others to block you.

Strategy 3. Continue your research and work with your coach or coaches. Leverage these relationships to understand the current threat you face. Is it real, or are you mistaken? Isolate the challenge so that you can generate some targeted solutions. You've built coach relationships for a reason—don't be afraid to leverage them.

Strategy 4. Get to the decision maker early. Yes, this strategy from Scenario 1 applies here as well. If you feel that the threat of a block exists, avoid that potential gatekeeper and get to the decision maker. Present the value of a business relationship between your two companies and develop that relationship. This may eliminate that potential block.

Scenario 3. You are actively blocked. We all know what this feels like. The words vary, but the feeling is always the same. You know you're blocked when someone says, "I make the decisions here," "Call me back in a few weeks," "I'm the only one you need to talk to in this organization," "Let me run that up the flagpole for you," or "The timing isn't right for your proposal." Whether it's said nicely and professionally or harshly and abruptly, the result is the same. The underlying message is, "You're a vendor, I'm in control, and we'll do things my way." This situation is tough for salespeople who sell value.

Beyond Selling Value means acting differently than the gatekeeper wants you to.

Before considering which strategy to apply to the gatekeeper, it's important to determine why the gatekeeper is blocking you. Is his or her reason rational or irrational? Is it emotional? By thinking this through, you may come up with the appropriate strategy. Here are some key strategies for dealing with a gatekeeper when you're actively blocked:

Strategy 1. Transform the gatekeeper into a coach. If there is a best possible gatekeeper strategy, this is it. We'd like to turn every gatekeeper into a coach, and sometimes it's possible. To do so, finding the gatekeeper's win is critical. As we said before, a coach is someone who wants us to win and who wins when we win. What does the gatekeeper hope to accomplish, and how

can you help? Show how a relationship with your company and your presentation to the decision maker will help solve the gatekeeper's issues, gain recognition for the gatekeeper, or make his or her job easier. By finding this win, you may turn the gatekeeper into a coach.

The following example, excerpted from an article in the *Globe and Mail*, illustrates the power of turning a gatekeeper into a coach:

Scheme to Tap Lake's Big Chill Not Just a Pipe Dream

By John Barber

Once considered a pipe dream and attacked by environmentalists as an irresponsible megaproject, an ambitious plan to cool downtown buildings with cold water drawn from the depths of Lake Ontario inched closer to reality last week.

Despite the environmental benefits of cooling buildings with inexpensive water as opposed to expensive electricity coupled with hazardous chlorofluorocarbons, the scheme was roundly attacked by local environmental groups when it was proposed two years ago.

Subsequently, *the committee charged with studying deep lake water cooling enlisted its opponents to help shape its strategy and, in the process, earned their support.*

With a broad-based consensus now formed in support of the concept, the City of Toronto last week officially gave its blessing and agreed to enlist the Metro government in helping to develop the massive new system, which carries an estimated price tag of \$700 million.

Ideally, your relationship with gatekeepers will not be adversarial. As the City of Toronto learned, converting opponents into partners will often both resolve conflicts and deliver the best possible solution.

Strategy 2. Involve the gatekeeper in the process. Depending on the style of the individual gatekeeper, involving them may be an effective strategy. If the gatekeeper is very outspoken and aggressive, this strategy is probably not appropriate. But for typical gatekeepers, involving them in the process is often more powerful than asking for their permission to execute the process.

For instance, try inviting the gatekeeper to review the business presentation you'll be making to the decision maker. Use wording such as, "George, I'll be making the presentation to Mr. Spacely, and frankly, it would be much more on target with the insights you might share. Would you mind reviewing my presentation?"

Another effective method is to schedule a research call with a gatekeeper just to involve him or her in the process. This often works because many gatekeepers see their relationship to suppliers in the same simplistic terms

in which Tarzan viewed Jane: “Me gatekeeper; you vendor.” As a result, both parties wind up assuming these roles, doing the Vendor Trap dance. But by using this process, it’s sometimes possible to introduce a new paradigm to the relationship and break out of those rigid roles. That’s what happened for a client of ours, Becky Igo, an insurance industry rep who was selling to a large bank. Here’s how she tells the story:

I was trying to gain access to an executive vice president to make a business presentation, but I knew I had to deal with an evaluator who stood in my way. This gatekeeper had a fair amount of influence on the decision maker, so I decided to try to leverage the strategy of involving the gatekeeper. I already knew this woman pretty well, so I conducted a research call with her and began the meeting with some high-impact questions.

My philosophy was, “Let me treat this gatekeeper like she’s not used to being treated.” I knew she was used to being looked upon by other vendors as a gatekeeper. So I did the opposite, involving her in the process and going beyond the usual product questions she was used to fielding.

Relatively soon after we began, I could tell that she was getting really involved in the process and excited. She said that she had never had anyone come in and call on her and ask questions like that before. Then she went on and voluntarily gave me some great coaching on how to gain access to the decision maker. I wound up presenting to her boss and closing on an opportunity that beforehand had been totally unavailable to me.

No, you won’t be able to convert your gatekeepers into coaches every time, but Becky’s experience shows that you can sometimes leverage this strategy to achieve results you could never expect from tying yourself to traditional gatekeeper-vendor roles.

Another possibility is to jointly include the gatekeeper as you conduct research calls. This strategy worked for a client of ours selling in the high-tech sector. He came face-to-face with a gatekeeper, who was blocking him from conducting any research meetings. The gatekeeper apparently feared that the rep was going to try to sell on the research calls.

To involve the gatekeeper in the process and reassure him, the rep invited the gatekeeper to join in on the calls. The rep promised not to do any selling and that his only goal was to learn more about the company’s business and develop a more effective business solution. The gatekeeper agreed, attending the first of three scheduled calls. After the first, however, he expressed admiration for what the rep was doing and said he didn’t feel the need to attend the next two research meetings. By participating in the process, the

gatekeeper did a 180-degree turnaround, going from opponent to advocate for what the rep was trying to accomplish.

Strategy 3. Neutralize the gatekeeper. Sometimes gatekeepers aren't as powerful as you think. Frequently, you can find ways to neutralize a gatekeeper. One method is to ask a coach or the decision maker (assuming you have the relationship to do so) to intervene on your behalf. By using a coach who has some influence over the gatekeeper or who has the confidence of the decision maker, you can frequently neutralize the block and proceed with your strategy.

Strategy 4. Sidestep the block. Again, when gatekeepers are not as powerful as they initially seem, you may be able to sidestep them with ease. Move outside the area they control and begin doing your research, developing relationships in related departments or divisions. Begin to build your coach network outside their areas of influence.

Strategy 5. Win in another area. When you're faced with a strong gatekeeper, a great strategy is often to win in another related organization and bring your success story to the appropriate decision maker, leveraging your win. This can often be done in the context of a cross-selling strategy, where you leverage executive relationships across organizational lines.

Strategy 6. Be persistent. Often you can simply wear down a block, and with a reasonably rational gatekeeper, this strategy may be sound. You may be familiar with the "rule of 40"—that no one can say no to you 40 times. We hope you won't have to face 39 nos with every opportunity before you get to yes. But be persistent—it pays off.

Strategy 7. Utilize someone else in your company. Often, you can leverage your manager or a senior-level executive at your company to gain access to like-ranked executives in the customer's organization. This way, you're not positioned as the "bad guy." Instead, you're merely following direction from above. Sometimes this strategy is a bit transparent, but it can shield you from a gatekeeper's anger.

An interesting variation on this theme was carried out by a client who found his path to the decision maker, a corporate VP of finance, blocked by the company's comptroller. Approaching the comptroller, the rep said, "This opportunity is very important to our organization, and it makes sense for me to work with you to develop a strategy for presenting to the VP of finance. Otherwise, my manager will just call on the VP himself. But I would much rather work with you, and you probably would, too, rather than to be taken out of the loop." In some cases, just the suggestion that you will intro-

duce more senior-level people into the process can overcome a gatekeeper's objection.

Strategy 8. Leverage your company direction or mandate. Think about it this way: your job is to sell value and to provide business solutions to your customers. Whatever you sell, your success comes down to how well you can affect your customer's business.

If you think about your job this way, you can leverage what your own organization expects from you. You can say to a gatekeeper, "My job is to sell business solutions to my customers. I need to understand their business and proactively present opportunities to address business issues and concerns. My company evaluates and pays me based on how well I deal with people at different levels of the customer's organization. I also need to understand my customers' businesses, their issues, their objectives, and their challenges. With this for a directive, it's difficult for me simply to respond to a bid."

By saying this, you communicate clearly and in a very personal way that your job, reputation, and success are on the line, determined by how well you deal with all levels in the customer's organization.

Strategy 9. Leverage your coach. In dealing with a gatekeeper, there are many ways to leverage coach relationships. As mentioned above, you might be able to ask the coach to intercede on your behalf and neutralize the gatekeeper. In addition, you can often involve the coach by explaining the situation and soliciting his or her insight and advice. In many cases, you'll find that coaches have the best ideas and strategies to help you move forward.

Strategy 10. Create a personal meeting with the decision maker. You can do this in many ways. For instance, you might create an event like a golf outing or a boat cruise or attend an association meeting or some other function where you know the decision maker will be present. Given the opportunity to talk to a decision maker, you may find an area of common interest and create for yourself an obligation to follow up with additional ideas, thoughts, or information.

Let's say you're in an association meeting with the decision maker, talking about some of the new quality developments in your industry. The decision maker shows interest in what your company is doing around these changes, and you offer to provide follow-up information. You then gather the answers and appropriate information, schedule a presentation meeting with the decision maker, and inform the gatekeeper of this impending meeting. This is your opportunity to leverage the commitment you made to the decision maker while in a different personal setting.

Strategy 11. Accept the block. Based on your T-chart and business case analysis, sometimes the appropriate strategy is to accept the block. This will be the case if the existing relationship you are risking is greater than the potential opportunity. If so, accept the block and move on. Come back and revisit the opportunity at a later date. But when you do come back, bring a sound business case analysis with you. In other circumstances, you may decide to walk away because an opportunity presents more work for you than it's worth. In that situation, you should consider focusing your efforts elsewhere.

Strategy 12. Go over or around the block. Of all the different strategies for dealing with gatekeepers, this is probably the most emotionally difficult. You may be asking yourself, "Do I really want to go over a gatekeeper's head? Won't he be angry? Won't he try to stab me in the back later?" or "What if she's mad at me?" As we discussed earlier, gatekeepers often have distinct motivations, and one of those motivations may be that they want to see you lose. If that's the case, you need not be concerned with the gatekeeper's feelings.

Think about it this way: gatekeepers want to control your strategy and may want you to lose. At best, they want to limit your effectiveness by trying to do your selling job for you. If the other strategies don't seem appropriate and you still need to get to decision makers, going over or around the gatekeeper may be the best alternative.

Now, you want to do this professionally and ethically, with good communication, but you still want to do it. And you need to make it personal. Remember that the gatekeeper wants to block you. She wants to keep you from reaching your objectives. You should take this personally and respond by challenging the block, gaining access to the decision maker, and showing the value of a business relationship between your two companies. We'll illustrate this process later in the chapter with two examples from our case files.

Remember, the gatekeeper wants to block you. Take it personally.

Salespeople often agonize over these situations and worry about how the gatekeeper will react. We recently found ourselves in a situation where we were blocked by a gatekeeper, knew we needed to elevate our access to his boss, and were worried about the gatekeeper's reaction. As we learned in retrospect, he wasn't angry at all—in fact, he didn't have the time to worry about it.

These are some of the best strategies for dealing with gatekeepers. Of course, there are many others. Depending on the specific scenario you face, one or more of the strategies listed here should prove highly effective.

Step 4. Select and Execute the Right Strategy

Each gatekeeper scenario you face is unique and deserves special consideration. As you use this four-step process, you assess the opportunity, guess at what the gatekeeper's motivation might be, brainstorm different alternative situations that might be appropriate, and then select and execute the right strategy. These steps assume that it is essential not to ignore gatekeepers. The longer you put off dealing with a gatekeeper, the more difficult you will find gaining access to the decision maker. By doing nothing, you are choosing an alternative strategy. You are accepting that you'll remain shut out from access to higher levels in the account.

One additional note to consider: salespeople often act as their own most powerful gatekeepers. We get so concerned that our primary contact will become angry if we talk to others within a target organization, that we don't even try. In most cases, these contacts don't mind. Instead, out of a sense of misplaced loyalty or a disproportionate respect for the customer's reporting channels, we assume this burden unnecessarily and block ourselves. Even though the contact or contacts haven't told us not to talk to anyone else, we act as if they have. Remember apologizing for approaching the decision maker is much easier if you were never told not to.

FINAL THOUGHTS

Here are some additional points to consider when selecting your strategy and executing it.

- *Solicit insight and advice.* Review the scenario with your peers, managers, and other sales professionals. Share with them the process you've gone through, and ask for their insights regarding your strategy.
- *Utilize your coaches.* Leverage these critical relationships. Review your process with them. Present the alternative strategies you've considered, and ask for their reactions and advice.
- *Implement your strategy by being strong, assertive, and assumptive.* A strong stance will make it hard for anyone to block you.
- *Consider the timing of your strategy.* Will any additional factors make your strategy less effective? Are there other operational or organizational priorities that may cloud the issue?

- *Develop a Plan B.* If your primary strategy doesn't work and, for example, all of your attempts to neutralize or develop a gatekeeper into a coach don't work, you need to create and execute another strategy.
- *Emphasize professionalism.* Regardless of your strategy, be professional and clear in your communication. Timing is critical of course, but when the time is right, you may consider informing the gatekeeper of your strategy.

"Don't ever slam the door; you might want to go back."—Don Herold

A key question you have to face is, "Do I communicate my strategy to the gatekeeper?" In some cases it makes sense, such as when:

- You have your presentation presold.
- The gatekeeper isn't powerful enough to cancel your meeting.
- You feel that by involving the gatekeeper, you may be able to get him or her on board.

In other cases, you should avoid gatekeepers entirely and keep them out of the loop on your strategy, such as when they are powerful enough to have your meeting canceled or they may use your strategy against you by helping to formulate your competitor's strategy.

Remember, you miss 100 percent of the shots you don't take.

This was the motivating concern for the executive we discussed earlier. His people were not taking any shots. They were walking away just because a gatekeeper told them to and, as a result, were missing out on significant opportunities. Remember, by executing this four-step process, you are doing more than the vast majority of your competitors.

In the words of Dave Fraser, an executive with IBM Canada, "We don't have a choice. We have to sell value. A going-out-of-business-strategy for us is to ignore the fact that gatekeepers don't buy value. We have to take it personally every time."

This subject reinforces something we all know and believe—that both art and science are involved in selling effectively. The science is having a process to follow and some good ideas to implement. The art is leveraging your experience and using the process appropriately in each situation.

CASES IN POINT

To give you some idea how a few of our clients dealing with flesh-and-blood gatekeepers have handled them, we've included the following three gatekeeper case studies from our files.

Gatekeeper Case Study #326B: "The Case of the Obstinate AVP"

Scenario Overview:

- Industry: High-tech
- Product: Communications systems
- Gatekeeper title: Assistant Vice President - Information Systems
- Decision maker title: Executive Vice President
- Block status: Severe

One of our clients faced a difficult challenge when he sought to expand the scope of his relationship with an existing customer. Bear in mind that this sales rep was on 100 percent commission and that he was a very ethical salesperson wanting the best possible solution for his customer. He and this customer had already established an outstanding relationship in one product area. He had four additional product families to offer and felt they could really make a difference.

He knew he had an outstanding opportunity to continue the impact of this customer's business, so he approached the assistant vice president, with whom he worked closely. He explained that he believed an opportunity existed to increase the benefits to both organizations by expanding the scope of the relationship.

Following the process, the rep had constructed an organizational chart indicating the other key players he would need to contact in the account. He mentioned to his contact that he needed to approach other AVPs to determine the appropriate fit. At this suggestion, the AVP bristled, responding with, "The timing's not right." The rep turned around and asked many of the same questions that you would ask, including, "Why is the timing not right?" and "What can I do to help improve the timing?" To these questions, however, he received curt, unhelpful replies.

Although he was disappointed, the rep nonetheless decided to wait until the timing improved. He recognized the value of the existing relationship with the customer, which was significant. As he did his T-chart, he came to the conclusion that it was worth it for him to wait and work with the AVP to determine when the timing might be better. He recognized the strong business relationship but never lost sight of the significant potential oppor-

tunities he would have to affect the customer's business—and also to pocket the appropriate commissions.

After a three-month delay, the rep approached the AVP again. After reviewing the idea, the AVP offered the same objection: "The timing's not right." The rep asked the same follow-up questions but, receiving the same responses, walked away and decided to wait some more. A few weeks later, he approached the AVP for a third time. Following the third "The timing's not right," the rep decided to change his strategy.

Questions:

- What would you do if you were this rep?
- Why do you think the gatekeeper was blocking the rep?
- From the information given, what do you think the rep's T-chart looked like?

The path forward. After doing the initial T-chart, the rep decided to accept the block until the timing might be more appropriate. But after three times, he became convinced that there was more to the story than this gatekeeper was letting on. After several months, the rep faced a decision—either live with the block, or go over the AVP's head. What did you say the rep should do? He decided to go for it. He knew he needed to gain access to the true, senior-level decision maker, so he wrote a high-impact Access Letter to the AVP's boss, the executive vice president. The EVP was the decision maker, with five AVPs reporting to him. The rep's strategy was to get to the decision maker, develop a business relationship, and hope that he could minimize the damage to the current relationship.

In reviewing his T-chart, the rep determined that his solution had become too critical to the customer's organization for the AVP to consider deinstalling it. The rep decided that the worst thing that could happen was that they could have him removed from the account. In reality, the way things stood, he wasn't acting in the best interest of his customer or his company anyway, so that alternative didn't seem so bad.

Before writing the Access Letter to the EVP, the rep refreshed his research. Then he wrote the letter, reviewed it with a coach, and presold the letter with the decision maker's administrator. The day the letter was sent, the rep met once more with the AVP. Yet again the AVP responded to the idea of expanding the relationship between the two companies with, "Absolutely not. It's not appropriate and the timing is wrong."

At this point, the rep made his intentions clear, saying he valued the existing business relationship but felt strongly that both companies could benefit from an expanded relationship. He shared that, given this belief, he had written a letter to the EVP requesting the opportunity to make a brief, professional business presentation. As he said this, he stressed the important role

the AVP had played in the success of the relationship and voiced a commitment to highlight this as part of the presentation. In closing, the rep made it clear that he would give the AVP credit for the relationship's success. You can imagine how thick the air in the office must have been during this intense conversation. In fact, the rep left the meeting not knowing whether the gatekeeper was accepting of, indifferent to, or furious at the news.

The Access Letter worked beautifully (see Appendix B for a sample letter) and the decision maker agreed to host the presentation. The rep executed the rest of the process by finalizing his research, drafting a presentation, reviewing it with a coach, and rehearsing it. When he arrived, ready to present, he found that all five AVPs were in the conference room, including the gatekeeper. At the start of the presentation, the gatekeeper exhibited negative body language, but the rep pressed on, delivering an outstanding presentation. By the close of the presentation, the AVP had become a visible advocate and supporter. When faced with the decision either to be a gatekeeper or to take credit for the success of the existing relationship, he chose the latter. He saw the opportunity, executed a 180-degree turnaround, and became an outstanding coach.

Results. This strategy worked very well. The rep gained access to the decision maker, neutralized the gatekeeper, and in the process succeeded in turning the gatekeeper into a coach. More importantly, he was able to expand the business relationship from one product family to three, strengthen his overall value both to the customer and to his own company, and take home a healthy commission as a reward.

The moral of the story. In reviewing this situation, it's easy to respect what this rep accomplished. Note the following critical lessons from the way this rep faced an imposing gatekeeper challenge:

- *He didn't accept the block blindly.* Instead, he formulated a business case analysis and decided that his first appropriate strategy was to accept the block and wait for a more advantageous time.
- *He revised his strategy based on changing conditions.* When he saw that his original strategy wasn't effective, he reassessed the situation and picked a new strategy.
- *He was professional and persistent.* He repeatedly asked for the opportunity and dug deeper whenever the gatekeeper said no.
- *He continually emphasized the gatekeeper's potential win.* Each time he discussed the opportunity to strengthen and expand the relationship, he committed to positioning the strength of the gatekeeper and giving the gatekeeper credit for the current success.

- *He communicated effectively and professionally.* Even after he made the difficult decision to send an Access Letter to the EVP, he communicated his decision to the AVP—intelligently. He waited until the letter had been sent and presold so as not to compromise its potential success.
- *He didn't take no for an answer.* In this case, recognizing the no wasn't easy. Here was a strong account with a contact who should have been positive and excited about expanding the relationship between the two companies, and yet the answer was still no. It was a veiled no, but a no nonetheless. The rep recognized this and didn't take no for an answer.

By the way, did you consider the gatekeeper's motivation in this example? What do you think it was? In fact, the gatekeeper was one of five direct reports to the EVP. He was achieving his objectives, and the rep and the rep's company were partially responsible for his success. In essence, he considered the relationship with this rep a part of his competitive advantage that he didn't want to share with anyone else. As is often the case, to work hard for the good of your client and your employer, you must challenge these gatekeeper scenarios.

Gatekeeper Case Study #219A: "The Power of Conversion"

Scenario Overview:

- Industry: Transportation
- Product: Consulting
- Gatekeeper title: Purchasing Manager
- Decision maker title: Vice President
- Block status: Moderate

When faced with gatekeepers, many of our clients feel that the best way to deal with the challenge is to convert that gatekeeper into a coach. If achievable, this is clearly a positive outcome.

One client we worked with in the transportation industry faced a difficult gatekeeper who did not support the rep's desire to gain access to senior-level management. Although the sales rep wasn't sure whether the gatekeeper had the power to block him, he did know that the gatekeeper could make his life miserable if the situation wasn't handled well.

The path forward. After creating a T-chart, the rep determined that the opportunity definitely warranted additional effort. He asked himself, "Why is the gatekeeper blocking me?" His best guess was that the gatekeeper was worried that his credibility would be damaged if the rep presented poorly

to senior-level management. As a result, the rep decided to include the gatekeeper in the process. This he accomplished in two ways. First, he conducted a research meeting with the gatekeeper. This research meeting was one of several, and the rep made it clear that he would be doing additional research with others in the organization. Second, when he scheduled a presentation with the senior-level decision maker, the rep approached the gatekeeper and said, “As we prepare for our upcoming presentation”—to which the gatekeeper was invited—“I realize that I would really benefit from some additional coaching. I feel that if you would review my presentation, it would be much more appropriate and on target.”

The rep then conducted a typical coach review of a presentation with the gatekeeper, giving the gatekeeper the opportunity to have some influence and put his own stamp of approval on the presentation. The review session also supplied the gatekeeper with an opportunity to see that this wasn't a typical product pitch—that the sales rep's organization was going to deliver a highly polished, professional presentation to the decision maker. Not only did this approach eliminate the gatekeeper's risk, it also helped the gatekeeper see that if the presentation went well, it could strengthen his credibility within his own company. This is exactly what happened, and the gatekeeper became one of the rep's strongest advocates within the customer's organization.

Gatekeeper Case Study #498D: “Permanent Vacation”

Scenario Overview:

- Industry: High-tech
- Product: Database management services
- Gatekeeper title: Assistant Vice President - Information Systems
- Decision maker title: Chief Financial Officer
- Block status: Most severe

Another client in the IT business faced a similar challenge in an opportunity with a multinational consumer goods corporation. In this case, his selling cycle lasted about six months and required frequent meetings with product evaluators, users, and all types of gatekeepers. The sales rep had no established relationship with the ultimate decision maker—the CFO—and was communicating primarily with the company's VP for information services.

In the midst of the sales cycle, the VP abruptly, with no explanation, cut short the sales cycle, telling the rep to, “Get the hell out.” This was an unexpected turn of events, and the VP gave no reason for his actions. Assessing

the situation, the rep could only conclude that the VP was a jerk who felt compelled to put up an irrational block.

The path forward. After creating a T-chart, the rep decided that the potential benefits of the opportunity outweighed the risks. Circumventing the VP-IS, the rep conducted four research meetings with disparate people in the organization. While the first three went reasonably well, the fourth represented a real breakthrough in the opportunity. This contact became a valuable coach, and even without knowing the specifics of the proposed solution, helped the rep gain access to the CFO. Later the rep found out that the coach had been waiting for a proposed solution that the VP-IS hadn't been delivering on.

With a presentation scheduled, the rep asked the CFO for a list of appropriate attendees. Notably, the CFO asked that the VP-IS not attend. Coincidentally, the VP-IS was soon leaving on a fishing vacation, so the rep took this opportunity to schedule the meeting.

As expected, the presentation went well. The CFO was impressed with the rep's knowledge of the corporation's business and what the company could accomplish with a new information system. At the close of the meeting, the rep obtained the go-ahead on all his proposed action steps and the guarantee of continued access to the decision maker.

In a few days, the VP-IS returned from vacation and called the sales rep in to see him. Predictably, the VP chewed him out, screaming, "I'm trying to build a highway here. When I need a jackhammer, I'll call you!" Anticipating the VP's anger, the rep calmly replied, "When you need a jackhammer, don't call me. I don't sell jackhammers. I help my clients build highways."

Shortly thereafter, the VP-IS was fired, eliminating the only remaining obstacle to the development of a mutually rewarding business relationship between the two organizations.

CONCLUSION

Despite what most salespeople think, gatekeepers do serve an important function. When an organization needs to make a purchase, gatekeepers are diligent about finding the product or service with the most appropriate specifications, the best service plan, and the lowest price. In addition, gatekeepers safeguard the valuable time of upper-level executives who can't afford to assess the offerings of every vendor who walks in the door.

But you're not just any vendor, and you don't merely sell a product. Because you sell business solutions and long-term business relationships, you are worthy of requesting some of that decision maker's precious time. In some cases, you will be able to convince gatekeepers that the decision maker will want to meet with you. Others will never see the light. In either

case, you must resist gatekeeper blocks. This four-step process will help you accomplish that goal and contribute to your increased success.

“Never let the fear of striking out get in your way.”—Babe Ruth

Remember, when you’re positive and assertive, it’s very difficult for anyone to block you.