

Hotel Business Review

Sales & Marketing

Lead Generation: Five Effective Methods to Successfully Engage Executive Gatekeepers

By Jim McAvoy, Founder & President, JWMcAvoy & Company Ltd.



Mr. McAvoy

The gatekeeper. Yes, the mis-perceived dreaded gatekeeper (i.e. the executive assistant). Not like the receptionist at the front desk of a luxury hotel, waiting to check you in and cater to your every need. No, the wall between you and an executive with whom you'd like to do business.

Stop! First of all, realize that you are dealing with an intelligent individual, who is intuitive and knows how to traverse the waters of shark-ridden corporate life. Is this gatekeeper friend or foe? That depends on your approach. For many of us working within the sales process, just the word gatekeeper conjures up emotions of anxiety, frustration, and disappointment. Many will attest that trying to curry favor with the executive's assistant is daunting at best.

Yet, it just doesn't have to be that way. It is simply another myth that can be dispelled with real-life situations (played out in the right way), resulting in a higher conversion of cold approaches to warm approaches. Below, I've listed five methods that, if appropriately utilized, should increase the likelihood that you will successfully engage the executive gatekeeper in a mutually positive and productive dialogue.

The net result, if done correctly, will be the successful delivery of your firm's introductory offering to your targeted buyer's e-mail and/or desk via hard copy. As a result, this will increase your probability of establishing new dialogues resulting in additional pipeline situations and, in turn, adding necessary incremental revenue to help you make your numbers for the next month/quarter and or year.

Method #1: Approach with Empathy

A useful prompt, when initiating a dialogue with someone, is the old adage about walking a mile in someone else's shoes. Executive assistants have a number of tasks and minimizing distractions for their executive is of paramount importance. Scores of sales people are bombarding them all day long, trying to tug on the cape to gain access. On top of that, their task of keeping an up-to-date calendar with priority internal/external meetings is enough to exhaust anyone.

Therefore, a friendly and understanding tone is required, along with patience, as you try to establish a positive rapport with the gatekeeper.

A couple of specific tactics are asking them if they have a brief moment to talk and to volunteer being put "on hold" if you hear another phone ring in the background. These gestures, while seemingly basic courtesy, are much appreciated and can go a long way in establishing a connection.

Method #2: Establish "High-Trust"/Positive Rapport

American journalist H.L. Mencken (1880–1956) describes the principal of this step very well: "For it is mutual trust, even more than mutual interest that holds human associations together." One must be solid and authentic to have a chance, and most gatekeepers can quickly detect when someone is a prepared professional and, likewise, sense when someone is a fast-talking charlatan pretending to have false referrals. Bottom line: no one likes a glad-handler. Be genuine, and mean it.

The conversation begins with a positive greeting/introduction and is further strengthened during subsequent follow-up contact. The "boomerang-of-honesty" will eventually surface—it always does—as a positive approach usually begets a positive result.

Method #3: Offer Respect/Appreciation

Executive assistants are typically very smart and intuitive. There is a reason why they are working with these senior executives.

In many situations it is company policy not to share an executive's e-mail address and/or their direct telephone number. Meet the gatekeeper where they are and don't push it. Simply send a clear introductory letter outlining your desires (via regular post, i.e. "snail mail"), and follow up a week later by telephone or e-mail. Sometimes the assistant will eventually share his/her e-mail address and instruct you to send it to just them, once you've respected their initial direction.

Yes, it's tempting to send the e-mail directly to the executive once you have discovered the "convention" of the company's e-mail format. There's no better way to erode trust than to blatantly disregard the assistant's helpful instruction. The reality is that most assistants have direct access to the executive's e-mail and will immediately notice the violation.

If you employ a "spirit of appreciation" in your attitude, it will exude in your words/tone and make for a much more pleasant and likely effective interaction.

Method #4: Subtly Demonstrate Your Completed Homework

It is a challenge to inconspicuously convey your knowledge of the executive, his/her role, reporting relationship, and a sense of the company's or division's leading priorities into the natural flow of the conversation. As part of your preparation, it is vital to confirm the correct pronunciation/spelling of the names of the gatekeeper and executive. This may sound overtly basic, but to most of us with names that are commonly misspelled or mispronounced, you know the mild aggravation when someone doesn't even make an attempt at clarification. It's an immediate turn-off. Take the time to get it right, otherwise you might be done within the first ten seconds. Ideally, you will gently weave in your knowledge of the firm's recent quarterly results and acknowledge your understanding of the firm's "tag line/mantra" that permeates across the entire enterprise. The assistant, if satisfied with your level of preparation, in most cases will begin

helping you and correcting your educated guesses with accurate data. It's as if you've "politely obligated" them to help you advance forward on the correct course.

Method #5: Listen Hard & Communicate Efficiently

Given we are examining a telephone-based communication, it is vital to "listen hard." Without any non-verbal clues, it is extremely important to listen to the actual words coupled with the tone and pace to instantly determine if you have interrupted someone or caught them on a bad day.

Keep your comments "short and sweet" when you talk, and avoid rambling at all costs. You may consider creating a short script to organize your thoughts, yet I highly recommend speaking naturally and then "finding your natural words" when on the phone (however, an outline will prevent you from missing key points). Most people can detect, and dislike, someone reading verbatim from a script—so be careful.

One suggested, sequence that has worked for me is as follows: [JWMC = Myself & EG = Executive Gatekeeper.]

JWMC: "Hello, my name is Jim McAvoy, calling on behalf of ABC Company—happy [day of the week]/[morning or afternoon] to you"

EG: They often laugh a bit and reciprocate the greeting back to me.

JWMC: "Do you have a brief moment or did I catch you working against a deadline?"

EG: "I'm busy yet I have a brief moment, how may I help you?"

JWMC: "Again my name is Jim and to whom am I speaking?" ... "As mentioned, [Assistant's First Name], I am calling on behalf of ABC company, and I'd like to send a brief e-mail to [Executive's name] understanding he/she is the [Title], yet I'd like to know if I should send it to you, him/her, or the two of you?"

From here the executive gatekeeper may ask you for a brief summary of your firm's capabilities, and this is where you succinctly provide that data and connect it to a unique dynamic within your targeted firm. Again, all you are trying to do at this point is have him/her agree to share e-mail addresses and/or possibly refer you to another colleague within the company.

So there it is.

Let me assure you that these five timeless methods will work for you. They have enabled me to successfully approach a number of the leading global hospitality enterprises and secure a wide variety of business relationships for my clients during my career. Basically, the approach is a combination of the understanding and utilization of elementary sociology, business acumen, and good manners.

You may now move forward, more confidently with a renewed attitude and strategy, based on these five methods, which will allow you to more successfully engage with executive gatekeepers and help you meet/exceed your revenue goals. Get those successful leads, then call up room service, have a massage, and meet me down by the pool for a well-deserved drink.

Jim McAvoy (Founder and President of JWMCavoy & Company Ltd., a lead generation firm based in Wyomissing, PA) has almost twenty-five years of experience maximizing sales results for clients in a wide range of industries, from boutique firms to Fortune 500 companies. Mr. McAvoy researches, creates, and delivers qualified leads as a consultant to his company clients, in addition to teaching his highly interactive five-stage learning process (L.E.A.D.S.) to sales teams, providing the necessary knowledge and skills that lead to top-level prospecting results. Mr. McAvoy can be contacted at 610-374-2443 or jim@mcavoyleads.com



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