

GETTING AROUND THE GATEKEEPER

One of the job responsibilities of “Sally Secretary” or “Nancy Nurse” is to screen the calls and the appointments of the decision maker(s). You must keep in mind that her objective is to screen calls and appointments to make certain that only “important” sounding matters get before the decision-maker. Therefore when approaching Sally or Nancy (either on the telephone or in person) you must make certain that she understands that you have come to discuss a very important topic specifically with the decision-maker.

Here are a few basics that will enable you to fully control every encounter with Sally or Nancy:

1. **DON'T** charm her--be very businesslike and official.
2. **DON'T** sit and wait for long periods of time in an office, or on “hold” for long periods of time on the telephone--if the decision-maker is busy you'll get back to him/her.
3. **NEVER** tell Sally or Nancy anymore than she asks!
4. Answer each question with a question. Example:

Rep: “I would like to talk to Mr. Morgan, please.”

Sally: “May I tell him who's calling?”

Rep: “Rod Star, is he in please?”

Sally: “Yes he is, what company are you with Mr. Star?”

*Rep: (Slowly) “N-C-S” (note, not the full name NCSPlus)
“Would you tell him that I'm here please?”*

Take note that Sally and Nancy know how to play this game too, so don't give out any more information than you have to. Respond to each of her questions. For example, don't introduce yourself as “*Rod Star from NCSPlus Incorporated.*”

5. Never tell Sally or Nancy what it is concerning.

If she is persistent and asks, tell her, as a last resort that it is a “Confidential Financial Matter.” Then add “now if you would please tell him I'm here and if he's too busy to see me now have him suggest a time and I'll be happy to call back/come back.” (Note: if the prospect objects to you using the “Confidential Financial Matter, say, “most of my clients consider delinquent accounts a confidential matter and appreciate the efforts made not to announce your business in the lobby.”)