

HOW TO MAKE A GATEKEEPER FEEL COMFORTABLE

If you routinely call gatekeepers and get lines like, “*You need a name to be transferred to anyone,*” it could be that you are routinely doing or saying something that is causing that gatekeeper to view you as a threat to her company’s infrastructure.

Effective communication skills allow you easy entrance to most any gatekeeper’s psyche. The first thing you must do to effectively communicate with anyone is put the other person at ease when you call.

This is not accomplished by demand. It is not accomplished by over-enthusiastic and phony-sounding greetings. Nor is it accomplished by over-long explanations of why you’re calling.

APPLY A FRIENDLY, FORTHRIGHT ATTITUDE

Technology will continue to change the way we do things, but technology will never come close to the one simple thing that humans need most from each other, and that is approval.

If that gatekeeper gets just the slightest whiff of falsehood from you, she’s out of there faster than a scared rabbit. If she senses a genuine friendliness from you that signals approval (of your own self as well as of her) she is much more apt to listen and apply herself to your request.

“But I am genuine and friendly!” you’re thinking.

Are you? Do people remark on your telephone voice? Do they complement you on your affability on the telephone? On your telephone skills?

The first thing you do when that gatekeeper answers is listen. You listen to what she says. You hear what she’s conveying. *“It’s a wonderful, sunny day here at ABC Corporation, Melissa speaking. May I help you?”* is a mouthful for any gatekeeper to get out and believe me, over time, the charm of it wears thin. Hesitating just slightly and acknowledging her dilemma before you blast her with your own agenda will go a long way toward making friends with her.

“Wow, Melissa, that’s a mouthful! It’s sunny here too, but we’re expecting rain later today!” will probably put her just a little off-guard and cause her to chuckle over the cross she bears so cheerfully.

Showing genuine empathy over her condition will make her just a bit more immediately comfortable with who you are and just might facilitate the communication between the two of you. Try it: I guarantee you’ll like the results.

But first, be sure you sound for real. Record your calls and listen to yourself. Get beyond the self-consciousness you feel listening to your own voice and actually listen to how you sound. What comes to mind as you listen to yourself? Do you sound real? Do you sound genuine? Do you sound sincere?

You’ll be surprised what you’ll hear in your own voice if you listen to it carefully. Take note of the thoughts that pass through your mind as you listen and heed them. It’s surprising how effectively critical we can be of ourselves when we really need to be.

If you don't trust your own judgment, ask others. Choose people you trust to be forthright and tell them what you're trying to accomplish. Ask them for their opinions about your telephone voice. Encourage their frankness.

Many times I have counseled a caller to speak up. Many times have I called to someone's attention that they mumble on the phone and are hard to understand. And more times than I care to recall I have told someone they speak too fast. Critique yourself or have someone you trust do it and work to correct your shortcomings.

If you don't quite get how these things work at first, that's okay. Just keep doing what you're learning, and you'll start to get a better feel for the whole thing.

GETTING PAST THE GATEKEEPER'S RESISTANCE

There are gatekeepers you will encounter who seem humorless and cold. It's very important not to let one of these initial resistances throw you off and cause you to quit. The key here is to listen. What does she say? What doesn't she say? Follow her lead.

If she sounds brusque and to the point, it's not necessary for you to reflect her mirror image back to her. She's more likely to respond to you if you are to the point (leave the brusque out) yourself and don't waste her time. In instances like these, use one of the names you've gathered before you made the call (you did do this, didn't you?) to offer as your admission ticket. She cannot deny you once you've paid the fare.

Sometimes a gatekeeper just needs to hear a little more about who you are before she gives out her information. She is the Keeper of the Gate and some of them take their jobs very seriously, as well they should. The more you interact with gatekeepers, the better you'll get at communicating with them. This skill will lead them to give you the information you want. Allow an older-sounding gatekeeper to assume command and follow her instructions. Do not resist her or try to get her to bend to your will. She doesn't have to and she usually won't.

How old does the gatekeeper sound? Younger and less-experienced gatekeepers usually offer less resistance, whereas middle-aged and older gatekeepers sometimes require more subtlety and creativity.

Just being respectful and polite to these kingdom key holders can be enough to encourage her to help you. And that's the key: ask for her help. When I encounter rigidity, I go soft. *"Can you help me? I feel so silly, I know I should know this but I don't. Can you please direct me to..."* will often engage her to the point where she will direct you into the area you need to get into. Avoid direct questions like the unforgiving, *"Can you tell me who the civil engineers are there in your facility who do wastewater engineering?"*

Rather, ask to be transferred to "the administrative assistant in the water group" and this less-threatening request will probably be put through. Once there, the department administrative assistant is likely to be young (though there are some older types in this bunch as well), but the idea is to forestall your defeat.

The more times you come up to bat, the more likely it is you will hit a homerun. It's a numbers game; never forget that.

HAVING FUN WITH THE GATEKEEPER

Very few gatekeepers are the humorless and cold garden variety. Many of them are friendly and vivacious types who enjoy the banter opportunity the telephone occasionally offers.

If you understand that the person on the other end of the line is a human being (nothing more, nothing less), you will have a leg up in this telephone names sourcing business. It isn't rocket science.

So make it fun for her by setting yourself apart from the madding crowd. If you're friendly, sincere will creep in along beside it. If she senses these two things in you, she will usually tell you just about anything.

There are male telephone sourcers who can give gatekeepers hard times and get away with it. There are females who can extract the most amazing information out of a CEO himself. There are both sexes who understand the Albert Camus assertion that, *"Charm is a way of getting the answer yes without asking a clear question."*

The point here is that sometimes it's necessary to get your questions answered by asking other questions that may not appear substantive to your mission. Do you know how to do that?

When I'm telephone names sourcing, I usually strive to sound like a 9-to-5 secretary who's bored to tears with what I'm doing and is just waiting for the whistle to blow so I can go home.

I don't say any of this stuff, mind you, but it comes across in my delivery. When I ask who the sales managers are for all the different U.S. territories and she wants to email the list, I will at first acquiesce to her suggestion. Then I ask, *"How many are there?"* After she responds, I'll daringly suggest, *"Oh, don't bother emailing them. That's not too many. Just list them out and if I need you to repeat I'll interrupt, I'm a fast typist!"*

This quick camaraderie, along with the mind-numbing boredom cadence I attach to my request usually gets the job accomplished. Not always, but usually. Remember, this is a numbers game.

There are several ways you can solicit someone's help that make it feel comfortable and fun for her. The important thing is that you're having fun and you're comfortable. Here's a fast tip from the music industry for making yourself physically comfortable when you're working:

Lift your chest. Place your hand at the bottom of your sternum and use it as a guide to lift the chest. When the chest is lifted correctly, the stomach muscles will lie flat; without having to suck it in, the back will be arched and the shoulders will be in a more natural position. In body language, high shoulders indicate stress, while lower, relaxed shoulders indicate confidence and control.

TALK TO HER LIKE SHE'S AN OLD FRIEND

The technique of acting like the gatekeeper is an old friend is powerful indeed. Once you master this relaxed state of thinking and behaving, you'll find that most gatekeepers will respond to you positively.

However, this does not include accosting the gatekeeper with some false hypocritical interest that betrays your intentions. Don't insult her intelligence by inquiring after her health or her feelings. Be respectful of her position and your relationship to her position. Introduce yourself politely and ask her for the information you seek.

Remember, you may be calling this person back numerous times, and if you become a professional telephone names sourcer, there's a very real chance that she may become a friend as you call her repeatedly in the future. There will be many more opportunities for familiarity. Don't blow your chances in the beginning by acting like a jerk.

WHEN ALL THIS ADVICE DOESN'T WORK

It happens. The fact is that sometimes you're going to meet a gatekeeper, or an administrative assistant, or an executive assistant, or an individual contributor, a janitor, a mailroom clerk, or whomever, who just won't give it up. It happens. Move on.

You can't bake a cake without breaking a few eggs.

You have to accept the idea that when you're learning how to use this material that you're going to occasionally run into someone who may not get your humor, may not appreciate your inquiry, or may not respond to your best practices.

Don't worry about it.

My personal best practice here is to just get off the phone as quickly as possible. I like to think I do it with grace and aplomb, but I know for a fact there are sourcers who just hang up. I find this rude, and you may be eliminating the chance to try on another day. When I first started telephone names sourcing, I remember fearfully asking, "Well, what do I do if..." and I was told, "If you get too freaked out you can always just hang the phone up. It's just a phone!" and in its own weird way the advice is right on the money.

I don't see any point in trying to reclaim a lost cause. Cut your losses and move on. Time is money in this business and there's always another way in. Find it.

So there you have it. There's your effective marketing presentation. Do 25 of these per workday...doctor's orders!



This article series originally ran on www.ere.net. Maureen Sharib is a telephone names sourcer, names sourcing since 1997. She and her husband Bob own the names-sourcing firm TechTrak.com, Inc. , which helps companies fill their hard-to-place positions at a fraction of the cost of traditional recruiting venues. Maureen is the moderator for the MagicMethod business networking site, a professional site for sourcers with an emphasis on telephone sourcing. She is also the author of the only of its kind and very popular Magic In the Method telephone names sourcing training course and a continuous contributor to many online recruiting-related sites. Contact Maureen at info@techtrak.com or (513) 899-9628.