



NLE Quick Tip: Engaging the Gatekeeper

Presenter: Rob Mosley, Managing Partner – Next Level Exchange

While it is always our goal to work directly with decision-makers and influencers, the reality is that we must often navigate past gatekeepers first to have valuable conversations with our intended prospects. Every relationship in an organization, whether it be at the executive, managerial, or individual contributor, provides us with the opportunity to gain insight into that individual and the organization at that particular level of the company. Your challenge is to view the gatekeeper as a bridge to build more trust and legitimacy in the prospect's organization.

In this NLE Quick Tip, Rob Mosley will help you better navigate the initial gatekeeper conversations and when appropriate, develop an additional relationship with the gatekeeper that can be leveraged as a source of access and insight throughout the organization.

Meeting: “Engaging the Gatekeeper” by Rob Mosley

If you are reviewing this episode with a team, watch the entire Episode and ask your group for their key takeaways and insights that they pulled from the Episode. Review the below to fill in the gaps.

(Facilitator): As tricky as it is to get to who you need to speak to in recruiting, there is a right and wrong way to engage the gatekeeper. Let's face it; no one wants to face rejection, and if up against an experienced gatekeeper – there is a possibility that could happen! As Rob suggests, we might need to adjust our paradigms to seek to understand the role of gatekeepers and how instead of hurting, they might be able to help us achieve our result if we are more prepared for what to expect! If you can convince a gatekeeper that there is a benefit to their boss speaking with you, not only will they give you access to the decision-maker, they may share a lot of valuable information with you along the way.

Rob defines a gatekeeper as an individual who has some level of access and influence with a decision-maker but typically not a part of the actual decision process. He describes three types of gatekeepers to be mindful of on your calls:

- The Advocate: they represent the most potential value and ease of access.
- The Accommodator: has a neutral interest in the relationship – neither adversarial nor advocating.
- The Adversary: typically, no interest in being of service and trained to keep “salespeople” out.

(Facilitator): With the definitions of the three types of gatekeepers, Rob shares some guidelines for how to work with or around the gatekeeper you encounter. Study and practice these tips when engaging with gatekeepers. What knowledge or research about the decision-maker could you share to establish trust?



Start High: Aim high and start at the top, versus gatekeepers at the general administrative assistant or operator. Rob stresses the importance of doing your homework before making your call.

Preparation is Key: Just like you prepare to call your candidates and clients- do the same for the gatekeeper. Your communication can be in the form of an email or a live call. With that in mind, use the information below regarding the I-Model and craft your message:

Introduction: I am. . . I am with. . . I specialize – Who you are and what you do

Insight: Share insight/ market knowledge – What is the purpose of the call? Also demonstrate what you know about the prospect.

Inquire: Ask purposeful open questions – How do I generate enough interest to continue the dialogue?

Inspire: Alignment/ value proposition – How can I generate enough legitimacy and demonstrate my value or expertise?

Invest: Investment/ commitment – How do I establish next steps?



Lose the Sales Clichés: Instead of saying you are “checking in” or “touching base,” what can you alternatively say in place of these clichés?

Take a Deep Breath: Rob makes a point in being mindful of being nervous on your calls as that will likely transfer to your voice, making you not sound as confident as you would like to project. Another way to calm the nerves is by sharing insight, which can help establish legitimacy.

Avoid Offering Too Much: Do not sell to the gatekeeper – influence.

Pattern Interrupt: Interrupt the flow of the conversation by taking control early in the call. Review Rob’s script and edit it to match your next request into a gatekeeper:

*“Good afternoon, this is Rob Mosley, with Accenture, who am I speaking with, please?
“Hi Ruth, it’s very nice to meet you. I’m calling for Sam Smith, your CIO.”*

Keep it Personal: Just like you remember your candidates and clients, take notes on gatekeepers. Remember their names, be personal but not too memorable. Additionally, be different by sending a handwritten note to stand out in the crowd.

Plan B: Always have a backup plan! If you can’t get through because you are communicating with an adversarial gatekeeper, your best bet might be a call before or after regular business hours. You never know, the decision-maker might be the one to pick up the phone!

(Facilitator): When tackling the most common questions asked by recruiters, Rob encourages us to use a response that involves the 4Cs: Correct, Concise, Courteous, and Confident. With these Cs in mind, script your answer to the following questions commonly asked by gatekeepers:

“May I ask who is calling?”

Can I tell them what this is about?
