



# 8 Techniques to Get Beyond the Gatekeeper

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## Common Gatekeeper Barriers

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### Overview

1. Too Busy
2. Take Too Much Time
3. Fair Playing Field
4. It's in the RFP
5. I Can Give It to You
6. Put It in Writing
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8. Against Policy

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## Overview

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Gatekeeper objections or Yellow Light(s) typically fall into three categories:

**TIME:** “They’re too busy to see you.”

**FAIRNESS:** “We want to keep a level playing field.”

**RESPONSIBILITY:** “I’m in charge of this project.”

- If you see, hear, or feel a Yellow Light—**SLOW DOWN!**
- Take a breath to resist the urge to speed up.
- Rethink the belief that if you work harder, the Yellow Light will change to green.
- Understand that a red light isn’t failure; failure is making the red light more expensive by not acknowledging it early on.
- Avoid absorbing all the responsibility to resolve the Yellow Light.
- Involve the client in sharing the co-responsibility for addressing the Yellow Light.

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## Overview

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### Use a Softening Statement to Slow the Conversation Down

- “I have a concern.”
- “I’m confused.”
- “I think we may have a problem.”

### State Your Concern

- “Without input from the CEO and key stakeholders, we won’t be able to get to a solution that exactly meets everyone’s needs.”
- “By talking to others, we’ll understand what our proposal specifically needs to include, as well as what’s not relevant and should be excluded.”

### Hand It Back

- What do you think we should do?
- What would have to happen to come to a resolution?

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## 1. Too Busy

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### Client Statement

They are too busy.

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## 1. Too Busy

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### SALESPERSON RESPONSE

#### Softening Statement

I can imagine they are very busy—particularly with all that's going on. The last thing we'd want to do is waste their time.

#### State Your Concern

And that's my concern. If we get them all in a room and give them a presentation that isn't really relevant or that doesn't adequately address their issues, it's a huge waste of their time. With just a 20-minute conversation with each of them—even over the phone—we'd be able to ensure that we make the best use of their time during the presentation.

#### Hand It Back

You know your organization better than I do—what would be the best way to set up these calls?

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## 2. Take Too Much Time

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### CLIENT STATEMENT

If we let you talk to other people, we'd have to let everyone do it. That would take up too much time.

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## 2. Take Too Much Time

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### SALESPERSON RESPONSE

#### **Softening Statement**

That's a paradox many companies are facing. They want plenty of competition to ensure a good choice and, at the same time, not bother people with too many additional meetings.

#### **State Your Concern**

Yet typically, the more competition, the less exchange of dialogue takes place between decision makers and providers. Without dialogue, providers are guessing and could well end up proposing solutions that make no sense to your organization.

#### **Hand It Back**

To ensure we're relevant in what we propose, all we'd need is a 20-minute phone call with each stakeholder. Does that sound reasonable?

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### 3. Fair Playing Field

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#### CLIENT STATEMENT

You can't. It wouldn't be fair. We want to keep a level playing field.do it. That would take up too much time.

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### 3. Fair Playing Field

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#### SALESPERSON RESPONSE

##### **Softening Statement**

Good. I want you to be fair. In fact, you have been more than fair in sharing all the information we have discussed today.

##### **State Your Concern**

And there are various stakeholders that are going to want to see their needs fairly represented in the solution we finally propose. It wouldn't be fair to them, to us, or to the best solution to tell them the prescription without a thorough diagnosis first. So let's be fair all around—I'm only asking for 20–30 minutes of their time, each.

##### **Hand It Back**

What do you think would be the best way to set up these meetings?

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## 4. It's In The RFP

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### CLIENT STATEMENT

All the information you need is in the RFP.

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## 4. It's In The RFP

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### SALESPERSON RESPONSE

#### **Softening Statement**

It's a very comprehensive RFP. People obviously spent a lot of time on it, and we appreciate the opportunity to respond.

#### **State Your Concern**

In fact, it generated a ton of questions and rather than run the risk of misinterpreting and giving you inaccurate answers, we thought a quick 20-minute conversation with each decision maker would actually serve everybody well—on your side and ours.

#### **Hand It Back**

If we promise not to be redundant, what would be the best way to set up these meetings?

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## 5. I Can Give It To You

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### CLIENT STATEMENT

You don't need to see them. It's my responsibility; they delegated it to me. I can give you all the information you need.

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## 5. I Can Give It To You

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### SALESPERSON RESPONSE

#### **Softening Statement**

And you have already been more than helpful in sharing a lot of good information with us.

#### **State Your Concern**

Let me run a thought by you. There are some specific items that require some of our experts to get in front of your experts. Since they talk the same language, bringing them together would avoid future misunderstandings and actually get you a better solution for your needs more quickly.

#### **Hand It Back**

Why don't we just talk with them together? We could do this in person or on a conference call if that's easier. What's the best way to set this up?

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## 6. Put It In Writing

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### CLIENT STATEMENT

Put your questions in writing. I'll make sure you get the information you need.

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## 6. Put It In Writing

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### SALESPERSON RESPONSE

#### **Softening Statement**

That's certainly an option. Getting things in writing is always helpful.

#### **State Your Concern**

And I'm wondering if this might end up being frustrating for everyone, since their answers will generate follow-up questions which they'd need to write more responses to. It's probably simpler for everyone if they just tell us the answers directly. That way we avoid taking up people's time and any potential irritation.

#### **Hand It Back**

How about this—I will write down my questions, give them in advance, and then we can have a 20- to 30-minute conversation. We can even do it on the phone. Does that make sense?

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## 7. Bidders' Conference

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### CLIENT STATEMENT

Go to the bidders' conference and ask your questions there.

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## 7. Bidders' Conference

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### SALESPERSON RESPONSE

#### **Softening Statement**

I appreciate the offer. We were planning on attending.

#### **State Your Concern**

Could I share our experience with previous bidders' conferences? We typically find that providers are reluctant to divulge their thinking in front of other competitors and as a result, the questions and answers people share are usually too generic to be really helpful.

#### **Hand It Back**

Let me run a different approach by you. Instead of trying to see all stakeholders all at once, why don't we start by you and me going to see one person? You remain in control, and if you see I add value in that first meeting, maybe we could go and see a second person, and a third, and so on. How could we go about setting up a meeting with that first person?

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## 8. Against Policy

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### CLIENT STATEMENT

You can't talk to them. It's against our policy.

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## 8. Against Policy

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### SALESPERSON RESPONSE

#### Softening Statement

I understand that there are policies in place. We also have policies in my company—some serve us all well, and some frankly seem to be so obsolete we're wondering why they're still there.

#### State Your Concern

Our company has a very strong policy that we don't propose solutions unless we understand key stakeholders' needs from their perspectives. We've found that guessing at those needs doesn't serve our clients well.

#### Hand It Back

Can we think of any creative way to meet the intent of both our companies' policies without offending anyone?

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