

## Sales Tip #2: Getting to the Decision Maker

Goal: Implement a 4 step process to get referred to a targeted decision maker from the office of a senior executive.

Message to Sales Managers:

One of the most challenging training topics is teaching sales people how to become comfortable calling directly on c-level executives, and successfully securing that first meeting with a decision-maker. Taking a top-down approach to prospecting is a no-brainer, but it's easier said than done. The following approach systematizes a process that all salespeople can easily execute against.

Best Practice:

Like any other aspect of sales, gaining access to executives involves both art and science. The "art" component is how well you execute – you personal selling style and the confidence with which you deliver your message. The "science" component is the system you use, or the combination of the process and the tools that are at your disposal.

Here is a process for gaining access to decision-makers that you can apply your artistic talents to:

1. Step 1: Pre-approach the targeted senior executive with a letter: Write a letter to introduce yourself, talk about how you have helped other businesses improve or overcome challenges in critical areas, and commit to calling at a specific time to schedule a meeting. If you have ever read "Selling to VITO", there are some good letter templates and approaches in that book. We called these our "VITO Letters".
2. Step 2: Pre-approach the executive assistant with a phone call: The goal here is to begin building a relationship with the senior executive's gate-keeper and pre-condition the executive administrator (EA) to help you. Let the EA know that the executive will receive a letter from you, and that you wanted him/her to be aware that it was being sent so that it "makes it to the executive's inbox" and doesn't get "filed". You will mention that you expect the executive may defer the meeting request to someone else on the management team who handles the business issues that you address, and that when you follow up with a phone call, you would be happy to be referred to the appropriate person if that's what makes the most sense. You are now conditioning the EA to help you get referred to your "real" targeted decision maker by the senior executive.
3. Step 3: Follow-up phone call to the senior executive. The executive assistant will likely answer the phone. At this point, this is your third "touch" to the executive assistant (1<sup>st</sup> phone call, letter, and now a follow-up call). You are beginning to build a relationship. Ask the EA if the executive is interested in meeting with you. If not, ask the EA to help "point you in the right direction". Ask to be transferred to the most senior member of the management team who handles the issues you address. Now you are being transferred internally to your "real" target from the office of the senior executive. This is an internal call transfer that your true target is likely to pick up!
4. Step 4: Secure the meeting: Have the conversation with your targeted decision maker and secure the meeting!

How Salesforce.com can help:

- Use Salesforce.com's Mail Merge feature to create a VITO Letter template to make generating your pre-approach letters fast and easy.
- Also, [salesforce.com](https://www.salesforce.com) has an Extended Mail Merge option. It is available by request at no cost and can be enabled by [salesforce.com](https://www.salesforce.com). Your System Administrator can activate/deactivate Extended Mail Merge by using: Setup | Customize | User Interface: "Activate Extended Mail Merge" check box (This check box is only displayed if the XMM feature has been enabled by [salesforce.com](https://www.salesforce.com)).
- Create tasks for yourself to schedule a regimen of pre-approach letters. Decide how many you want to send each week, then research the target companies and create the senior executive contact records that you will need to generate the Mail Merge pre-approach letters.
- Log your calls, and create follow up tasks so that nothing slips through the cracks. Remember – timing is everything!
- Use the call scripts provided in the [Resources](#) section of the HarvestGold web site for steps 2, 3 and 4. You can even use Salesforce.com's [Advanced Call Scripting](#) application to help with the phone call if you like!

Good Selling everyone!