Chapter 4

How to Gain Access to the Executive Level
Gaining a first meeting with senior-level executives is relatively straightforward for most professional salespeople with a bit of preparation and personal chutzpah. However, gaining return access to those same executives again and again is the real art. Executives don’t waste time with people who add no value. More challenging still is building the type of trusted relationship where the executive will call you to discuss issues that are unrelated to anything you might be selling, but that are on her mind and that she hopes you will have insight into because she respects you as someone who has the pulse of the market. This chapter reveals how to develop this type of rapport in ways that come across as authentic and genuine because it shines through that you have the executive’s best interests at heart.

We asked salespeople who cover a portfolio of small and medium-size enterprises how they reach executives in those companies. By eliminating times known to be set aside for internal meetings and learning something about the executive’s personal schedule, some salespeople are able to divine answers as precise as, “Tuesday mornings from 7:30 to 8:15 a.m., or every second Friday at 4:00 p.m. at the golf course.” They have it down to a tee! These salespeople also confirm that in medium-sized companies, it is often the owner-operator executive who turns off the lights at night—so a call that is placed after working hours is likely to be answered by the executive directly, or by a front desk security guard who will typically transfer your call right through.

We asked salespeople who cover a portfolio of large enterprises how they reach executives in those companies. A typical description of that environment is:

You need a road map to navigate the maze of presidents, senior vice presidents, vice presidents, junior executives, directors, consultants, and various other chiefs. And even when you’ve figured
out whose department a project resides in, there’s no guarantee that you can find who owns the pain. Plus you must contend with an army of personal assistants whose job it is to protect their boss’s calendar from anyone who’s not already on the approved list.

However, most of these salespeople agreed that an executive’s assistant hears his boss on the phone all day, attends many of the same meetings, and understands what’s topical and what a valuable idea looks like. Therefore, courting the assistant as though he were the executive himself shows respect for the role he plays and often opens doors that might otherwise remain closed.

And there are always examples of personal ingenuity. Here are two:

• A computer hardware salesperson whose territory spanned the area from Seattle to Salt Lake City to San Diego recalls that at one company, while he waited in the lobby for his appointments, he watched how people leaving the building treated the receptionist with respect as they walked out the door. The receptionist at this company was a mature lady who was always immaculately dressed and coiffured, and everybody, regardless of rank, made a point of nodding or talking with Barbara.

One day this salesperson asked a mentor about the unusual deference people were paying, and he learned that Barbara was the company’s fourth-largest shareholder and one of its original founders. She had traded a corner office for the front desk, where she could be the first face that greeted customers and could hear all the unguarded conversations that vendors and partners had in the lobby. Barbara served as a sentinel to protect her company’s interests, and she had a direct line to all her executive peers. Needless to say, the salesperson in question cultivated a cordial relationship with Barbara, and shared his ideas on initiatives that he felt her...
company would benefit from. Accordingly, his ability to meet that
company’s executives increased.

• A supplier of software to a telecommunications company was so
frustrated by what she described as “the high level of dysfunction,
politics, and ass covering” in her client’s business that she wrote a
30-page report titled “20 Reasons Why Selling to You Sucks.”
Maybe she’d watched Tom Cruise deliver his mission statement in
Jerry Maguire one too many times. But she cared about her client
as much as she cared about her quota, and she could not restrain
herself. She printed only one copy, bound it in a faux leather cover,
and hand-delivered it in a large envelope.

The next two weeks felt like an eternity. Every morning she
expected her sales director to call her in to account for her impul-
siveness. She began to wonder if she’d done the right thing.
Sixteen days later, she received a phone call inviting her to lunch
with the customer CEO. After exchanging pleasantries, he asked
her two questions: “Are you confident that what you wrote is accu-
rate?” to which she told him she was. Then he asked, “Why are you
telling me things that even my own staff members don’t admit to?”
to which she replied that while she did not know the answer, she
was sure that this lack of communication was getting in the way of
the company’s moving forward. The CEO agreed, and within two
months he had seconded this outspoken salesperson to his com-
pany for six months, granting her a roving commission and wide
powers to root out the problems and initiate change.

In return, the salesperson’s company would be given any contract
it wanted to bid on during that six-month period, and her company
made hundreds of thousands of dollars from the arrangement.
Unsurprisingly, the salesperson accepted a full-time role in her
client’s company after the six months were over so that she could
finish what she’d started, but her successor in the sales role contin-
ued to enjoy several years of prosperity because his predecessor had
had the courage to give an executive something to really think
about. Executives love to be challenged and solve problems when salespeople serve as peers instead of hucksters.

In asking salespeople who call on small, medium, and large companies how they reach executives, we found that, while tales like the ones just given provide some anecdotal value, they are not as valuable as hearing from C-level executives themselves.

The executives we talked to in our research projects complained about receiving too many calls from “people who think I ought to be involved in every purchase. It’s a real aggravation because they are selling above where they need to be, and they clearly don’t understand or care about how our process operates.” Calling on the wrong executive not only wastes the time and resources of salespeople, but also damages their credibility and their chances of a future relationship with that executive.

IDENTIFYING THE RELEVANT EXECUTIVE

Competitive salespeople don’t waste people’s time, least of all their own. They identify the relevant executive for each sales opportunity, and they take time to understand the dynamics of their customer’s organization to uncover where influence, power, and control over a particular project reside. “It doesn’t have to be the CEO of a corporation,” said one respondent. “It could be someone who has great influence with very little formal rank.” We are reminded of Barbara the receptionist.

To determine the right person to target, executives suggest that salespeople ask two questions.

“Who Will Really Evaluate, Decide, or Approve the Decision?”

An executive who initiates a project often reserves the decision-maker or approver role before she hands down the role of evaluating vendors
to others. By way of definition, a decision maker is the person who analyzes the results of a formal team of evaluators, listens to recommendations, and then makes the final commitment to a vendor or to a certain course of action. There is usually one decision maker who makes that commitment.

On the other hand, an approver is usually a more senior person who reserves the right to review and approve or veto the decisions made by the decision maker. If the decision maker owns the budget and is trusted to make choices that are in the company’s interests, the approver serves to offer objectivity but typically rubber-stamps what the decision maker wants to do. If the decision maker is new, under scrutiny, or about to leave the company, the approver’s role becomes more active to safeguard the right decision.

As a rule, the executive who holds the highest rank and greatest influence regarding a particular project is the person you should always be sure to spend time with. This is the relevant executive associated with the sales opportunity. Another way to determine the relevant executive is to find the highest ranking executive who stands to gain the most or lose the most as a result of the project or application associated with the sales opportunity. Anyone above this person who is not involved in the project or is not affected by it is not an appropriate contact. Anyone below this person does not have a broad enough view of the project, can give you bad or misleading information, and through ignorance of the issues can even extend the sales cycle unnecessarily.

“Who Has the Highest Rank and Greatest Influence?”

Every company has the formal structure of leaders and followers, ranks and reporting lines. You see the structure and ranks printed in annual reports and on people’s business cards. It’s the legitimate chain of command that companies need in order to preserve order and divide labor, and it is easy to identify. Some people obsess about
climbing that hierarchy as a means of securing wealth, power, and control. But if rank works as a constant, do eight vice presidents in the same company all exert identical levels of influence? Rarely. Influence is the informal, political power that people wield. It rarely maps along the lines of a formal hierarchy, which makes it difficult to see. In reality, it operates exactly like a personal currency in that it rises and falls with how much of it is created, stored, borrowed, consolidated, exchanged, or spent. It is also affected by the relative influence of others in the community.

**THE DYNAMICS OF ORGANIZATIONAL INFLUENCE**

People gain influence and control from their level of involvement in and value to a discussion or project (created), by past contributions that still confer a level of credibility and respect (stored), by powerful people or brands they are associated with or anointed by (borrowed), and by how popular a person or idea becomes, and the level of support and number of people who back it (consolidated). People lose influence and control when the people or more influential brands that they were associated with go away or fall from grace, whereupon the influence that was borrowed or consolidated reverts to the amount of influence a person holds on his own (exchanged). People also lose influence by making mistakes, making enemies, or simply becoming has-beens whose stored supply of influence is depleted (spent).

As Janet Jackson crooned on her third album (coincidentally titled Control), we should all ask ourselves, “What have you done for me lately?” and take stock of our personal currency with the various stakeholders we want to be involved with, inside and outside the business arena. This is because influence doesn’t have much of a shelf life. It doesn’t store well.

So how do you identify a relevant executive who (1) is involved in a buying decision, (2) has a personal interest in the outcome, (3) has
adequate rank to affect the formal decision process, and (4) has sufficient influence to affect the informal decision process? Executives we interviewed told us that there are four things to look for:

- What people have done (their track record)
- What people do now (their value)
- Whom people know (their network)
- Their ability to drive change (their will)

Their Track Record
Psychologists will tell you that the most reliable indication of future performance is past performance. People who have influence have a track record of consistent success. This doesn’t mean that they are always successful. It means that they are consistently successful. When you hear that someone is “on a roll” or enjoying “a lucky streak,” or when her “stars are in alignment,” watch closely and you’ll see that “success begets success.” Success has a muscle memory, so when people enjoy success in one area of their life, they leverage their value and their network of associates to exert their will on their surroundings across several fields. That’s influence. When you are trying to identify the relevant executive, look for patterns of success or lack of success in an individual’s personal or work history. People with no track record have no currency to invest in the influence game.

Their Value
People build their track record in a number of different ways, but the key to maintaining it over time is creating value for their company, its executives, their customers, their peers, their partners, and other stakeholders. That’s what you get recognized for; that’s where you gain a reputation. The value may be personal and qualitative, such as introducing someone to a new idea or a topical book or news article,
introducing him to people in your network who can help him, or simply bringing him useful information. Or the value may be commercial and quantitative. But as stated earlier, the influence you gain from these moments of glory soon fades once time outweighs the impact of your past contribution.

Value is, therefore, an everyday pursuit. You need to keep the iron hot. When you are trying to identify the relevant executive, look for the people who understand and can articulate what value looks like to their company, who are also contributing to delivering that value—as validated by their name being linked to all the right projects and talked about in all the right circles. Look for the people who are regarded as movers and shakers. If they are perceived as creating value, have a decent track record, and are connected to the sale you hope to make, they’re candidates for being the relevant executive.

**Their Network**

The next marker we look for is each person’s network: her tribe, grapevine, posse, alma mater, or power base. People who build influence are always plugged in to an informal chain of command, serving as either the hub or one of the spokes. They recognize their own limitations and surround themselves with people who can compensate for those limitations and balance them out. For example, new staff members who understand how influence works will connect with the alpha dog to learn the ropes and gain protection or favor. Old-timers will always nurture their allies inside and outside of their organization to stay current. Just as in the adage “birds of a feather flock together,” sometimes these networks are made up of people who went to college or an MBA course together, past colleagues in another company, or people who worked together on various projects in the same company. People tap into these networks for information, for advice, and for favors. All members of a network are bound by mutual advantage, what the Chinese call the rule of *guanxi*.
Easily understood as “I’ll scratch your back, then you scratch mine,” guanxi (pronounced guan-shee) is a fundamental tenet in Asian cultures whereby people become trusted as “insiders” through the mutual exchange of information, favors, or other forms of value. According to Luo Yadong’s book Guanxi and Business (World Scientific Publishing Company, 2007), the Mandarin word guan originally meant “a door”; its extended meaning xi is “to close up,” meaning that behind the embrace of the closed door, you may be “one of us,” but outside the door, your existence is barely recognized.

People who are “inside the door” of a network know about events before they happen; they’re connected. In Italy there is a phrase for this: radio scarpa. The literal translation means “shoe radio,” and the colloquial etymology refers to people who know what’s going on simply by walking around, as though their very shoes could decode signals from every office in the company via the floorboards. Understanding this, a shrewd salesperson will know that if she doesn’t know who the relevant executive is, or cannot reach him, the best approach is to broadcast her value to people on the grapevine. Sooner or later her message will reach the relevant executive.

To identify these players, always look for the people whose names are linked to many projects and discussions; look for the people who attend meetings and say very little, but whose few questions demonstrate deep insight that’s beyond what they’ve heard from you; look for the people whose opinions others defer to, regardless of their rank; look for the people who seldom act surprised when they hear breaking news.

Without support from an executive’s allies, it can be difficult to gain access.

Their Will

People with influence exert their will on the company; they set things in motion and change the status quo, and people follow them. But they seldom do it from their first day on the job. When a person joins
a business, he learns how things work within the culture—how decisions are made, how ideas are discussed, even how people generally dress and speak. The way it works in business is the same way it works in college: you assimilate and work within a culture, or you get branded as an outsider. People build influence by first acclimating to the pervading belief system of how things should work (the company’s philosophy) and working within the rules (the company’s policies).

A former executive of Telecom New Zealand who was given the task of driving business transformation in a company that was resistant to change recalls:

You can’t afford to scare the horses, or they’ll bolt and you’ll never catch them. Even though you’re the only white horse in the herd, you must throw on a blanket that makes you look like a brown horse, and get close to all the other brown horses so that they get to know you. Over time, you can let the blanket drop until they see that you’re a white horse. But by then you’ve eaten the same hay and galloped in the same fields long enough that the horses have learned to trust you as one of their own. And of course, when the right horses neigh in your favor, the rest of the herd follows.

He first operated within the philosophy and policies of his company, created value, built a track record, and developed his network with various stakeholders so that he could drive change that would be supported.

This is how people with influence exert their will. When they have enough support from the right people, they can begin to interpret company policies as soft guidelines instead of hard rules, and find ways to change those policies for the benefit of the business. When a person reaches this level of influence, her personal philosophies start to be manifested in official ways, regardless of her official rank.
Donald T. Regan (1918–2003) was a tough-talking Wall Street financier who was appointed by U.S. president Ronald Reagan as his chief of staff, a role he was ousted from in February 1987. In his tell-all book *For the Record: From Wall Street to Washington* (Harcourt, 1988), Regan revealed that First Lady Nancy Reagan regularly consulted with astrologer Joan Quigley, whose exchanges shaped government policy as a result of Nancy’s pillow talk with the president. Regan blamed his being fired on the first lady and her tarot card reader, neither of whom held any official rank, but who had plenty of influence. He writes: “Virtually every major move and decision the Reagans made during my time as White House chief of staff was cleared in advance with a woman in San Francisco who drew up horoscopes.”

Dèng Xiāoping (1904–1997) never held office as head of state, but he served as de facto leader of the People’s Republic of China from 1978 to the early 1990s. He was widely regarded as having backroom control without official rank. U.N. Secretary-General Kofi Annan said that Deng was the “primary architect of China’s modernization and dramatic economic development,”¹ which included the revitalization of Shanghai’s Pudong New Area as China’s new economic hub, and the foundations for China’s eventual entry into the World Trade Organization, which significantly changed the global economy.

Karl Rove (1950–) ran a company that managed direct mail, telephone polling, and fund-raising; according to the *Atlantic Monthly* magazine,² he was the primary strategist for 41 statewide, congressional, and national races between 1981 and 1999, of which his candidates won 34. That’s a lot of friends in high places. He was appointed by George H. W. Bush to advise on the 1980 presidential campaign, in which Rove was fired mid-campaign for leaking information. Such was Rove’s influence that he was rehired to handle direct mail for the 1984 Reagan-Bush and 1992 Bush presidential campaigns, from which he was fired again for leaking information. He returned to advise George W. Bush in his campaign to become...
governor of Texas in 1994, in his 1998 reelection campaign, and in his 2000 and 2004 presidential campaigns. Following the 2004 U.S. presidential election, Bush referred to Rove as “the architect” because of his role in taking Bush to the White House. Rove later became regarded as “Bush’s brain” and the real power behind the throne. It is unlikely that Rove could have exerted his will without his track record, his value, and his network, all of which he had carefully assembled throughout his career.

People without influence lack the power to work outside the boundaries set by others and must view policies as rules that cannot be broken. People with influence can interpret and modify an organization’s rules as though they were mere guidelines. While others might be punished for doing so, those who are influential routinely have their acts legitimized as correct under the circumstances of the moment.

So to learn which people have influence, we must profile the stakeholders in a customer’s business, looking at all these factors. When we do this, front-runners quickly and clearly come into focus. But beware: multiple people can all have various levels of influence. The final question we must address is: “Which person is most influential with regard to this sale?”

To find the answer to this, we explored whether there are degrees of influence and how to tell the difference. Company executives and successful account managers confirmed that influence is like energy—most of the time the influence of the people you’re selling to lies dormant as stored or potential energy. It’s not until something happens that the potential energy is released as kinetic energy and is set in motion to act upon the environment. It’s in times of change that a person’s influence is most apparent.

For example, when a new policy says that managers must obey a hiring freeze, but one department continues to hire without adverse consequences, this may indicate that the manager has enough influence to treat the rules that others must abide by as mere guidelines. When
your customer undergoes a restructuring, a merger, or an acquisition, watch closely who consolidates his power or has new roles created for him, compared to those who see their empires unravel. Often those changes appear as a flash of lightning in the night sky, when everything is suddenly illuminated. Changes like that don’t happen overnight or without prior discussion; people either decide what should happen, make those things happen, or wonder what happened.

Those who decide what happens are usually the most influential. These people control outcomes and shape what happens by defining the organization’s goals and objectives. They surround themselves with trusted lieutenants who serve as their eyes, ears, and arms to make things happen. Because of their connections, they understand what is going on before it occurs, can anticipate what changes are taking place, and avoid the traps and dead ends that others blunder into.

Because influence doesn’t follow the hierarchical lines of authority, it is possible for a junior staff member who has huge subject matter expertise to be at the hub of a decision-making process, enlisting a higher-ranked boss to legitimize her ideas by creating or rewriting a formal project. This is an example of influence flowing up from subordinate to superior. It can also flow sideways from peer to peer, and, as established earlier, external parties holding no rank at all can exert influence on a group. Influence can also flow from the boss down to the members of his staff, although when this happens it is more difficult to know whether you’re watching the effect of influence or simply rank at work.

We might picture this informal structure as three concentric circles, as seen in Figure 4.1.

The inner circle (those who decide what happens) holds the highest influence and is surrounded by its network of allies and trusted resources (who make things happen for those in the inner circle). On the periphery is everyone else who gets involved in a project solely because formal roles require it. These people typically wield power only in proportion to their titles.
The closer to the center someone is located, the more influence that person holds. It's here that the relevant executive for any sales opportunity will be found, for the inner circle is composed of those people who typically find ways to initiate projects that require funding and who have the most to gain or lose based on the outcomes. Like the modern-day parable that in a plate of bacon and eggs, the chicken is only a participant, whereas the pig is fully committed, so it is with those relevant executives in the inner circle who have skin in the game.

Because influence is situational, the people you find in the inner circle and their network will change from opportunity to opportunity. It’s important for you to understand this, because some salespeople we have consulted fall into the trap of mapping the politics and influence in their key accounts for one deal and then expecting those things to remain constant in the next deal. Influence is always in motion as a by-product of the nature of each opportunity and who needs to be involved in the buying process, the incumbency of current
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suppliers, who wants to preserve those suppliers and who wants to replace them, whether a project fits within a department’s discretionary spending levels or needs to be escalated, and the fact that people fall into and out of favor all the time. People may leave, and new people with allegiances of their own may be hired. There are so many variables that we recommend that you profile influence one opportunity at a time.

Once you’ve identified the right executive to sell to, the next question is how to gain access.

GAINING ACCESS TO EXECUTIVES

According to our research with C-level executives, the most effective way to gain access is through a recommendation by someone in the executive’s company (see Figure 4.2). A full 84 percent of executives said that they would usually or always grant a meeting with a salesperson who was recommended internally. This highlights the importance of building companywide relationships that open doors to senior management.

<table>
<thead>
<tr>
<th>Method</th>
<th>Always</th>
<th>Usually</th>
<th>Occasionally</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendation from someone in your company</td>
<td>16%</td>
<td>68%</td>
<td>16%</td>
<td>0%</td>
</tr>
<tr>
<td>Referral from someone outside your company</td>
<td>8%</td>
<td>36%</td>
<td>44%</td>
<td>12%</td>
</tr>
<tr>
<td>A letter or e-mail, followed by a telephone call</td>
<td>4%</td>
<td>20%</td>
<td>40%</td>
<td>36%</td>
</tr>
<tr>
<td>Cold call by telephone</td>
<td>0%</td>
<td>20%</td>
<td>36%</td>
<td>44%</td>
</tr>
<tr>
<td>Contact at an off-site event</td>
<td>0%</td>
<td>44%</td>
<td>32%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Figure 4.2 Scorecard of Methods for Gaining Access to Executives
Other methods did not fare as well. Referrals from outside the organization are sometimes successful, yet more than half of executives will never or only occasionally meet with a salesperson who has been recommended by an outside contact. Cold calling ranked the lowest, with only 20 percent of participants saying that they would usually grant a meeting as a result, while 44 percent said that they would never respond to cold calls. A letter or e-mail sent before the call improves the odds only slightly.

With 84 percent of executives saying that they would usually or always meet a salesperson if that salesperson were recommended internally (87 percent in China), the study clearly indicates that establishing relationships at lower levels of the organization is critical before trying to access the executive’s calendar. One CEO explained that he would grant a meeting “when I see or hear something that might be applicable in my world, or at the request of some of my cohorts around here.”

These “cohorts” are part of the executive’s influence network; they may be a friend of someone in the executive’s inner circle, an internal consultant, or a low-level employee within the organization who just happens to have credibility with an inner-circle executive.

Competitive salespeople understand and work the influence networks within their customer’s organization. “I’m always trying to find someone I can approach to mentor me and help maneuver my message through the account,” said one sales executive. “I strive to build a win/win relationship by finding people who can benefit from this relationship. They actually sponsor your effort to reach senior executives.”

Our China research provided scores with similar highs and lows, with a variance of plus or minus 3 percent. But in talking with directors of government-run enterprises, managers of private companies, and the executives of foreign-owned companies trading in China, we found some new reasons why Chinese executives prefer to meet salespeople only after they receive a recommendation from someone they trust.
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To explain it, we’re going to need a quick history lesson to help you understand where they’re coming from.

Understanding the Mindset of Chinese Executives
Six hundred years ago, China was a political, an intellectual, a military, and an economic colossus. In his groundbreaking work *1421: The Year China Discovered America* (Harper, 2004), Gavin Menzies contrasts China’s position on the fifteenth-century world stage with that of the major European powers of the time, and concludes that in every way, China ruled supreme:

At the inauguration of emperor Zhu Di’s Forbidden City in Beijing on 2 February 1421, 26,000 dignitaries ate a ten-course banquet served on fabulous porcelain. At the feast to celebrate the coronation of Catherine of Valois as Queen of England on 21 February 1421, 600 guests ate one course of salted cod on slabs of stale bread that served as plates. Zhu Di’s walled city was more than 1400 times the size of the walled City of London. Later that year, King Henry VI went to war against France commanding an army of 5000 men who he ferried across the English Channel in four fishing boats. In the same year, Emperor Zhu had a standing army of one million men.

The Emperor had more than 1350 warships, 3000 merchant vessels and 400 grain transports, plus an armada of 250 treasure ships equipped with cannons and rockets that transported 30,000 men around the world. Each ship was 400 feet long. By contrast, Columbus’ Santa Maria was 82 feet long, about the size of one of Zhu’s ship rudders.

The Silk Road was open all the way to Persia. China’s industrial system was flourishing. Forward bases had been opened around the Indian Ocean. The way was clear for Zhu Di’s greatest gamble yet—the entire world was to be brought into Confucian harmony.
Yet within 150 years, a change in policy saw China reverse its expansionist policies, scrap its navies, and burn its shipyards. It entered a long sleep, where it remained while other world powers emerged during the Industrial Revolution. In the 300 years that followed, China was embroiled in various wars and rebellions, mounting debts, the loss of Hong Kong to British rule, and the eventual end to 5,000 years of imperial rule. China first became a republic in 1912; this republic was overturned by a prime minister who declared himself the new emperor in 1915, then “died” a year later, leaving a power vacuum that was greedily filled by ruthless warlords who carved the country into fiefdoms.

After World War I, the revolutionary Sun Yat-Sen set out to unite his fragmented nation through an alliance with the Communist Party of China and with help from the Soviets. His protégé, Chiang Kai-shek, disagreed with communist rule and seized control of the rival Nationalist Party, using military force to defeat the southern and central warlords. He then waged war on the Communist Party itself in 1927 and drove its supporters to the northwest in what became known as the Long March, during which the communists reorganized under Chairman Mao Zedong. China then endured 14 years of tumult that included the Japanese invasion and World War II, during which time the communists succeeded in winning popular support. Facing oblivion, Chiang Kai-shek fled with his Nationalist Party to form the government of Taiwan in 1949, the same year that the People’s Republic of China was formed as a new nation on the mainland. Today’s tension between China and Taiwan originated here.

Chairman Mao instituted the Great Leap Forward, an attempt to lift the economy by mandating the production of steel in backyard furnaces, which Mao promised would turn China into a world-class steel producer to rival the United States and the United Kingdom. This was a massive financial and humanitarian disaster that saw the country denuded of trees and labor diverted from harvesting to melt pots and pans. Worthless cheap iron, famine, starvation, and around
40 million deaths were the result of this pipe dream. Mao stepped
down in 1959 and was replaced by new leaders.

And China heard: “Don’t believe promises, only facts.”

In 1978 China became a market economy, and in 2001 it entered
the World Trade Organization and opened its borders to foreign busi-
ness. As the world shifted production to low-cost Chinese mills and
factories, China became cash rich. In a bid to acquire the legitimacy
of western marques, it has attempted or completed partial or whole
acquisitions of the following:

• IBM’s PC division
• General Electric’s home appliance division
• Morgan Stanley
• Standard Bank (South Africa)
• PetroKazakhstan
• Fortis insurance
• Rio Tinto
• MG Rover automotive
• Unocal oil
• Maytag appliances
• Marconi telecommunications

Decades after Mao’s communal privations, China’s nouveaux riche
have responded to Deng’s battle cry, “To get rich is glorious,” going
from nothing to everything in just a few years. In preparation for the
2008 Beijing Olympics and 2010 Shanghai World Expo, massive cap-
ital expenditures were made to modernize those cities. According to
some sources, almost a quarter of the world’s 150,000 construction
cranes are now in China. As Time magazine journalist Hannah Beech
writes:

To be suddenly wealthy in China is to be engaged in a full-
blown, keeping-up-with-the-Chans spending contest. In June, a
Bentley sold for 8.8 million yuan ($1.06 million) at a Beijing auction—apparently because eight is a lucky number, not because the car was worth that amount. In the gambling paradise of Las Vegas, Chinese jet-setters have displaced Japanese industrialists as the most prevalent—and most welcome—group of high rollers. Chinese entrepreneurs don’t tend to do the Jeff Bezos thing—dressing down in wrinkled khakis. “In China, if you’re rich, you have to look the part,” says Wang Deyuan, who owns one of the top ad agencies in southern China. “You have to show you have money, otherwise no one believes that you’re rich.”

And China heard: “If you can’t see it, it isn’t real.”

“I’ll believe it when I see it” is a common sentiment. This is a product of the executive wanting to remain at a safe distance in case things go pear-shaped; he can’t lose face if the salesperson is managed through an intermediary. But once value is exchanged and future value is offered, a Chinese executive will be more willing to allow the relationship to be transferred. When this occurs, the person who referred the salesperson gains face under the rules of guanxi.

So the rule of thumb when trying to gain access to a Chinese executive is to be patient and work through trusted intermediaries until the executive is ready to deal directly. It can take a year—some say two—for the executive to see that you’re in for the long haul. Your company brand can help you open doors, but ultimately it’s the longevity of a personal relationship that executives are after, along with access to your personal network—again, guanxi at work.

If two vendors have a similar product, but one has a prestigious brand, association with the prestigious brand will win every time. If two vendors have similar products and equally prestigious brands, but one salesperson is known around town and has a strong network of associates, it’s the relationship exchange that will win every time.

Think of it as one giant game of Facebook and LinkedIn, where your reputation and the people you know are as good as hard currency.
HOW DO EXECUTIVES SCREEN AND TEST SALESPERSONS?

The first gauntlet you run when you’re trying to meet any executive is the system of roadblocks that are put in place to preserve her calendar or diary. You must find a path through these screens and filters, and then introduce yourself in a way that will cause the executive to give you a meeting.

Roadblocks don’t exist just to make life difficult for salespeople. Most of the time they’re a legitimate mechanism that has been put in place to help the executive focus on important tasks rather than distractions.

Why Do Roadblocks Exist?

In some companies, getting calendar time with a senior executive may happen only if you contact the executive assistant or the executive’s secretary. You simply can’t get on the executive’s calendar by contacting him directly. In that case, you may have to either use a sponsor or treat the assistant as a resource to help you schedule a meeting with the executive.

The chief causes of roadblocks are the following:

1. Executives delegate meetings of this type.
2. It’s the formal process used in this organization.
3. The executive is too busy to schedule meetings with external suppliers.
4. The executive’s previous experience with salespeople suggests that they should be seen by lower-level executives first.

Figure 4.3 Causes of Roadblocks
Getting Past the Roadblocks

We’ve provided a worksheet in Appendix 2 for planning how to bypass the roadblocks you face. The techniques that can be used to address them include the following:

• When there’s an organizational change in your company, suggest having a meeting to explain the new structure.
• Suggest a meeting with an equivalent-level executive from your organization (like-rank selling).
• Accept redirections to meet other executives or people of lower rank, but always ask the executive to make an introduction and request a follow-up meeting to review the outcomes.
• Schedule a meeting with an executive to communicate past value delivered or to confirm your ongoing value.
• Contact the executive when there’s any significant event in the customer’s market, even if it’s unrelated to the current sales campaign. Executives like to know that you’re thinking about them, even if there’s nothing for you to sell.

The stakes are high if you cannot access the relevant executive. Some of the latest data from companies whose sales cycles are nine months or more indicate that it may cost more than $200,000 to pursue an opportunity, whether you win or not. That’s a significant sum to bet on selling to low-level managers. If you don’t have the chance to get past the gatekeepers and meet the relevant executive, it may be prudent to walk away and save the cost of sale.

There’s one other word of caution that bears mentioning at this point: don’t attempt to circumvent the gatekeeper unless you have a high degree of confidence that you can obtain the meeting with the executive. As one savvy salesperson put it: “Hell hath no fury like a gatekeeper scorned!” Once she is around a roadblock, a salesperson will be quickly tested. CXOs told us that salespeople who get past
their roadblocks on a cold call get five minutes to show that they can add value. Here are some tips:

- Speak from a business perspective and don’t get caught up in the “bells and whistles” of product features.
- Raise relevant questions and share business perspectives that are new to the executive.
- If you’re an incumbent, point out the potential limitations of your products in light of changing demands and provide ideas for making improvements, thus enhancing your credibility.

CHOOSING A PATH

After you’ve evaluated whether it’s more advisable to work with the gatekeepers or to go around them, you’ll need to decide how to navigate that path to the executive. How do you go from where you are today to gaining an audience? Most salespeople know at least four approaches for achieving access to senior executives (see Figure 4.4). As Figure 4.2 showed earlier, some of these approaches are more successful than others.

![Diagram showing Overt, Sponsor, Referral, and Gatekeeper approaches to gain access to executives]

**Figure 4.4** Tactics to Gain Access to Executives

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An overt approach is one in which you contact the executive directly. This type of approach can be accomplished by a direct telephone call, or by a telephone call preceded by a letter or an e-mail. However, don’t be surprised if the overt approach leads to your being sent down to lower levels. Our research revealed that 44 percent of executives would *never* respond to this approach, and only 36 percent said that they would respond *occasionally*.

With this approach, someone inside the client’s organization helps you gain access. It’s absolutely critical that the sponsor have credibility with the executive. In our research, executives said that this was the most effective way to secure access to them. In fact, 68 percent said that they *usually* grant an audience to salespeople sponsored by a credible person within their own organization, and 16 percent said that they *always* do so.

With a referral approach, someone outside the client’s organization (such as a business associate, consultant, or friend of the executive) helps you secure access to the executive. In most cases, this is an effective way to reach the executive. As with a sponsor, the referral’s credibility with the executive is critical to success.
Gatekeeper

Try treating gatekeepers as though they were the executive. Explain your proposition and ask their opinions. The best executive assistants will be conversant with their boss’s key business issues and will immediately see your value. The poor ones won’t understand the discussion but may pass you forward because you sound like you belong. If you are successful in obtaining a gatekeeper’s support, keep him in the loop.

INITIAL CONTACT WITH THE EXECUTIVE

In Appendix 2, there is a template for an initial telephone call to the executive. You can use this template to help you prepare to contact the executive for the first time. It contains five simple steps:

1. Preparing Your Approach

Simply put, you want the executive to perceive you as being prepared, succinct, and confident. This call should not last more than three or four minutes. If you can determine an executive’s personal agenda and address it while also addressing her business agenda, you will have easily developed competitive differentiation.

2. Introduction

Begin with a brief introduction that clearly states who you are and why you’re contacting the executive. Explain your connection to your sponsor or referrer, if appropriate. You have only one opportunity to make a first good impression! This is particularly important if this is your first meeting with the executive. You want to make certain the
executive understands that you did some level of preparation prior to the meeting.

3. Purpose

Explain the purpose of the call. You’ll have to explain to the executive why you’re calling him. This could be to arrange a meeting to discuss a specific business issue that you understand to be compelling to the executive. Paraphrasing what hundreds of senior executives told us consistently: “One of the single best ways for a salesperson to gain credibility at my level is to listen before proposing a solution. This is the number one trait I look for in salespeople I would consider as candidates to be one of my Trusted Advisors.”

4. Credibility

Explain the homework you’ve done on the executive’s organization, or perhaps cite the past value you’ve delivered to the organization if this call is to an executive in an existing client organization. Another option is to describe how you’ve helped other companies address similar challenges.

5. Commitment to Action

Propose a clear and specific action or next step, such as a meeting. Executives like to be told what you expect them to do. Have a set of next steps ready to request at the meeting with the executive, and be willing to be held accountable for accomplishing them.

If the executive refers you to someone at a lower level in the organization, this may not be the result you wanted, but it isn’t a train wreck either. The executive may simply be referring you to someone
in her network of advisors who is better suited to evaluate the discussion. It always helps to do three things:

1. Ask the executive for an introduction to the person, because this is far better than your having to call him cold. You can leverage the fact that his boss sent you to talk.
2. Ask her what she hopes you will achieve with her subordinate, and what additional people are suited to have the discussion with you. Turn it into a networking opportunity.
3. Ask to reconnect with the executive to review how what you hear from her subordinates compares to the level of readiness in other companies for which you’ve solved the same problem. Executives typically like to know how their company benchmarks, so use the occasion to demonstrate your value as someone with insight beyond the executive’s silo walls.

Here’s what one sales professional shared about this topic:

My customer went through a management reorganization, which eroded some of my support base. I had a good relationship with the engineering manager who was promoted to COO when the former COO was promoted to CEO. I wanted to get close to the new CEO, so I called my contact for advice. The COO confirmed my ideas about the issues that were of most importance to the CEO, and agreed to support my solution if I was successful in getting it positioned.

I then contacted the CEO and asked to meet with him. After explaining the ways I felt we could add value, he said it didn’t make sense for us to meet unless I first had the support of a mid-level manager whom I’d never met and didn’t know existed. I could have perceived this to be a negative outcome. But it was clear that this person’s opinion mattered to the CEO: she was in his personal network. I did a thorough discovery of the firm’s
key business drivers, and after the meeting she sent an e-mail to the CEO suggesting that it was a good idea to discuss future opportunities in more detail.

This is a clear example of how being referred down can grant you credibility with other key players, and in return enhance your credibility with the executive who sent you there in the first place.

With these tips, you’re on your way to securing a first meeting with the executive even when you’re making a cold call, albeit a well-researched one! However, if your company provides air support in the form of marketing campaigns designed to trouble the executive about business problems he faces that your company can solve, your chances of success are greatly magnified because the executive is already warmed up to recognize that he has the problem, and he already knows that your company plays in the space.

Whatever the approach, you’re now ready to meet face to face, where the first item on your agenda is to establish your credentials and your credibility.
Chapter Summary

Let’s summarize what we’ve discussed in this chapter about the second question in our research: “How do salespeople gain access to executives?” Let’s break it down to the top three messages:

1. **Identify the relevant executive.**
   There is one person who most feels the pain and has skin in the game. If a project to find a supplier is already underway, the relevant executive is the person who first identified the need and had the credibility to turn it into a formal project backed by resources. If you’re trying to create a project by tapping into a problem that the customer needs to solve, the relevant executive will be the person who has the most to gain or the most to lose. Many stakeholders will need to be met and developed as supporters. But at the center of the web is the executive who is most relevant to this decision. She may not always be at the very top of the company, so sell only as high as you need to. But a general rule of thumb is: **the bigger the pain, the higher the game.**

2. **Get close to the influencers.**
   Every decision to buy from a supplier involves several evaluators, one decision maker, and possibly several approvers. This is the formal decision process. Outside of that, there are other people who get involved who have influence disproportionate to their role. Some of these may not even be in the customer’s organization. Finding the *power behind the throne* and aligning your sale with his agenda is critical. If you win the formal vendor
evaluation but you don’t have political support, you might lose the deal. If you lose the formal vendor evaluation but you have powerful influencers on your side, the formal criteria will change to justify your winning. Nobody says this is fair, but it’s how every large investment decision is made, even in government contracts. Learn and master these rules; they’re the only ones that really matter.

3. **Navigate the roadblocks.**

Executives test salespeople to see if they’re worthy of an audience. Sometimes this is for sport, but most times it’s to protect their calendar from time wasters. Their organization will include project leaders, executive assistants, and others who will tell you to deal solely with them, tell you to go away, or leave you hanging while you wait for them to return your call. There are several options you can choose for getting past the roadblocks, or even for converting the blockers into allies. When you choose to go around someone or over her head, you need to weigh the pros and cons of doing so based on the situation at hand. Research shows that using the telephone to cold-call an executive is the least effective method, with an 80 percent failure rate. Gaining a referral from someone the executive trusts is the most effective, with an 84 percent success rate. If you have strong marketing support that regularly troubles the executive about the problems he is facing, the referral to meet you will usually come from the executive himself.