EP
sales training Inc

3 fail-safe strategies for getting meetings with CEOs

An EP White Paper 2021
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3 strategies for getting meetings with CEOs

Abstract
Email is still the primary way to set up appointments with the C-Suite in a large business. For many items and services, appointments can be made with the purchasing officer. But when firms sell high-ticket items and services, no sale will be made unless the CEO or CFO is convinced of the need for, and benefit of, investing in the product being offered. Targeting the CEO means making sure they open the email and act on it by setting up a meeting, or (currently) the Zoom equivalent. This has been made more difficult because the Covid-19 pandemic has had an economic impact on firms and changed working practices, adding to the considerable array of concerns CEOs already have and limiting the time available to read email and consider new undertakings. This white paper sets out three email strategies that help sales and marketing executives to be more certain of winning the attention of the C-Suite: the cleverest way to connect to any CEO, a confident way of cracking that default resistance, and a technique for getting those top people to meet with you.

The problem in context
It has become more difficult than ever to get a business’s promotional material in front of the CEO via email, due to time and energy constraints of the C-suite – be it CEO, CFO or others – and the increased gatekeeping activity of the CEO’s Executive Assistant.

This can feel unjust to any sales team that has an excellent product or service.

There is therefore a need to find a way over the virtual wall to the top of the prospect’s hierarchy when a high-ticket product or service needs justifiably lengthy consideration followed by authorisation for the firm’s purchasing manager to go ahead and buy.
Why has this problem increased exponentially in the last year?

It makes no difference whether the CEOs and their C-suite colleagues are from large public companies or other bodies such as private companies, public sector organisations or not-for-profits. All CEOs have new and competing challenges since the onset of the Covid-19 pandemic:

- Revised revenue prospects, which need both visionary macro adjustments and sectional micromanaging until the way forward is clearer. McKinsey reports CEOs are taking on four new ways of working in response to the latest events – including raising their “to be” list to the same level as their “to do” list.\(^1\) This also hampers attending to sales offers arriving on their desk.

- Increased cyber threats from non-friendly states as well as from the usual network of malcontents on the dark net. The balance of risk and innovation is harder now for CEOs to negotiate. Palo Alto Networks reports endless Covid-themed attacks on firms of all sizes, including phishing and malware, fake apps, suspicious domain names, ransomware and infostealing.\(^2\)

- Ever-changing regulatory policy in many industries and businesses regarding privacy, financial regulation and business transparency – yet having to work with a temporarily Covid-dispersed Board and shareholders, and (currently) a workforce unexpectedly removed from the original norms of in-house communication possibly unwilling to return to their offices, but open to poor adherence to best practice when working from home.

- The constant threat and stress of observation and criticism by shareholders and Board members in the new economic climate, and fear of being found wanting. In 2000, a CEO might remain for 10+ years but in the last decade many survive only 5, according to a PWC report (see Figure 1).\(^3\)

Figure 1: How long CEOs survive
Having to hold the big picture in mind, including closing branches and making staff redundant, while at the same time needing to authorise the kind of decisions the sales and marketing executives in other B2B businesses need them to do.

**Particularly relevant here in the context of 2021** is the fact that B2B businesses that want to cold sell to other big firms are hampered by varied and changing privacy and spamming laws in the West that have made it harder to approach CEOs directly using personal email addresses.

**The data privacy question**

In Europe and in the UK, under GDPR rules, there has to be a legal basis (such as legitimate interest) to email an identifiable person without their consent, as the address is considered their personal information. Firms keeping addresses on their computers have to register with the Information Commissioner’s Office. In addition, this email will breach the UK Data Protection Act if the target’s address is passed to a third party without the data owner’s consent (see Figure 2). The risk of being sued and paying substantial fines is never far away when data breaches happen so frequently.

![Figure 2: GDPR considerations](image)

Other countries’ rules, such as Canada’s CASL, will need to be considered as well.\(^4\) This is because understanding data privacy is not a simple regional requirement. Firms now deal with customers all over the world.

On the other hand, cold calling is not suddenly illegal. But when everything about cold calling within sales and marketing in 2021 hinges on data protection, Woodpecker makes a salient point here: “both sides must be likely to benefit from the email” and the email should be “logically connected to their business statute”.\(^5\)
This is all the more reason to ensure that emails are sent legally and carefully targeted to hit the mark with a particular prospect and achieve the response the marketing director wants from the prospect firm’s CEO.

However, once a firm has grasped the legalities and implications of what applies to whom and where, there are several proven strategies to get those meetings with the VPs and CEOs up and running via email.

We deal with those in the next section.

Three solutions that secure that meeting

1 Connect to any CEO by this clever method

In light of the increased challenges mentioned above, the cleverest way to connect to a CEO is to acknowledge the stress and time constraints a CEO is under. This should be upfront in the email.

McKinsey, commenting on the continuum of CEOs’ good use of time to bad – with allocation of time being effective in some situations and not in others – points out: “This makes it stressful for CEOs to even think.”

Some stress is beneficial but in the case of an overworked CEO, not so. Stress works on their body in this way: their overstretched sympathetic nervous system releases the hormone cortisol into their brain as soon as yet another email pings into their inbox. The rush of cortisol immediately destroys the ability to think. This dates back to prehistoric times when hunters had to run for their lives when a woolly mammoth attacked – rather than stop and discuss how they would decorate their cave with its hide if they captured it.

The marketing executive’s email to the CEO prospect presents a dilemma: should they open it or pretend they haven’t seen it? Is it worth their time? Or should they "flee"? The human brain is wired for survival.

The email must therefore immediately act to lower the CEO’s stress levels by bringing online the parasympathetic nervous system – slowing their breathing, lowering their heart rate and stopping the panic reaction.
This can be achieved via the headline and/or the first two lines of text previewed on their mobile. Lower down in the email is too late to capture sufficient thoughtful attention for the email to be opened.

Calming and persuasive email openers assure the CEO that you understand and are aware of the pressures they are under (empathy), as well as offering them something that will benefit them in this situation (authority). Something that calms their alarm, so to speak. CEOs are humans at heart and will respond.

EP advises sales teams to use their copywriters to help them brainstorm the cleverest, most persuasive headings and opening lines of these emails to maximise the possibility of success.

2 Crack that default resistance with confidence

The default position when CEOs are overworked and challenged in the latest financial climate is to ignore emails. Their Executive Assistant (EA) may well have been instructed to put emails in trash using their judgement, or at least file them to possibly deal with “one day”.

The way to crack this default position is to confidently do something unusual. For example, send something eye-catching by snail mail first and address the package to the EA, admitting straightforwardly that you are using extreme measures to access them because you will be needing to email and speak with the CEO. Then – crucially – ask them the best way to go about this.

Jeff Hoffman suggests also that showing vulnerability in the message accompanying the unusual mailing (eg “I don’t want to look stupid”) will get the EA’s attention. He adds: “The EA can be critical in your campaign to reach the CEO, so don’t shoot yourself in the foot by dismissing them.”

EP believes all contacts with prospective CEOs should be designed with the individual and their organisation in mind. But to crack the initial resistance, it’s much more productive to be confident and inventive in whichever
approach is chosen – including going personally to the EA for help to climb over that wall of the firm’s initial resistance to yet another request.

3 Get those top people to agree to a meeting

This is the ultimate aim of sales and marketing: to hold a meeting (or, in this case, a Zoom meeting) with the CEO to initiate discussions about a high-end product that will need their approval to be carried forward and investigated further.

There is a way to do it, and its origins are in Neuro Linguistic Programming (NLP): make assumptions. This approach is best done via email, and equally best done with the addition of a persuasive and “truthful but catchy” email header. The difference in this third strategy is that this email segues straight into a request to meet.

*The crucial point is that the request uses both an assumption and a statistic relevant to their business needs.*

Some research is initially required to identify an appropriate statistic or fact – something that will benefit their business. This might be anything connected to the points we made when listing the challenges that CEOs currently face.

When the statistic or fact has been identified, it must be paired with the assumption and carefully worded.

CEOs, just like recalcitrant school children, can be susceptible to negative attitudes of “it can’t be done” or “I don’t know”. So the assumption is phrased in a question: “When would it be convenient to meet/Zoom so that I can show you how X will relieve your business of the problem of Y?”

The assurance that the product will help needs to be stated confidently but with no over-hyping, just factually.

This “assuming” style of question achieves two things. It not only shows understanding of their business (maybe by quoting something you learned from their website) but also neatly avoids a negative answer by subtly bypassing it. The question has assumed there will be a date and there will be time to meet.
A different assuming question that might be appropriate is to ask to be put in touch with the person in the C-suite who has the authority to meet and act on the proposal in the interim “while the CEO is so busy post-Covid”. In other words, there is someone who can act for the CEO.

EP’s experience, again, is that the best way for the sales team to compose this email is to make use of the firm’s in-house or freelance copywriter to help dream up the best solution for the target firm.

Conclusion

Many famous firms have used these three field-tested strategies for gaining access to CEOs. But the solutions are, in essence, psychological tactics designed to appeal to the humans involved in the C-suite. Power they may have, but they are also real people underneath the challenges and stresses they face – people with preferences, longings, families, homes and a life outside the business. CEOs have a professional side guiding their decisions, and a personal side with its own inclinations. They will always respond to real, human contact, such as we suggest here with these three strategies. Good sales training will encompass strategies like these that work on a psychological and human level as well as on a business one.

The three methods detailed here specifically bring fruit by calming stress levels, showing vulnerability when asking for help from the EA, and deploying a basic NLP assumption message to help the CEO make positive decision with least stress.

They are easily deployed with the help of our free unique email templates* that help you plan out your approach and put it together logically. You will find your success rates rise and your diary fills with appointments to meet with CEOs.

Gaining access to the CEO, legally and profitably, is not easy but it is doable. Even amid the chaos of post-pandemic economic turbulence.
The next step

*Download your 2 free, unique email templates here.

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EP Sales Training, Inc.

EP has led sales training for many years, visiting firms on site to teach sales teams how to reach and sell to VPs and CEOs. Working in 25 countries with a diverse staff of 4,000, fluent in many languages, their 2019-20 revenue was $XXXm.

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