

### Gaining CEO Access

By Andrew Sobel

Do any of these laments sound familiar?

“We want to move up in the organization, but we’re stuck working with a mid-level director”

“This is a major, target client for us. We’ve been trying to meet the CEO, however, without success. We just cannot get the access.”

“We’d like to get broader visibility for our work, but our current client doesn’t let us go above him”

“The CEO is the economic buyer--they need his approval to buy our project--but we don’t even know him.”

“There’s a new CEO, but we can’t get on his agenda”

“We are viewed as functional experts rather than trusted advisors. We need better access to line executives who make the strategic decisions.”

One of the most common questions I get--phrased in different ways but all focused on essentially the same goal--is about how to build relationships at a higher level in the client organization. In some cases, the situation involves a prospective client, in others, a current client. So let’s talk about “Getting on the CEO’s agenda.” We’ll use the CEO as a metaphor for the various executives and/or economic buyers that you may be trying to meet--for example the CFO, COO, a division president, the SVP of marketing, the head of human resources, and so on.

This is an important, and complex, subject. In this article, we’ll look at four dimensions of the problem:

A day in the life of the CEO

Why do you want to meet with the CEO?

What’s preventing you from meeting with the CEO?

What are strategies to get on the CEO’s agenda?

The real question you should ask, of course, is not “How can I convince the CEO to meet with me?” but rather, “Why would the CEO be interested in meeting with me?” To set the stage, let’s get inside the mind of typical C-level executive. Over the last 20 years, I’ve personally worked with several dozen CEOs, and more recently, I have interviewed a great number of top executives on this topic (i.e., Who gets on their agenda and why?) Here are some basic things to remember about the daily life and mindset of senior corporate executives:

They are under enormous pressures, and their time gets scarcer each year. The number of internal meetings and demands to work with external constituencies (customers, suppliers, regulators, shareholders, analysts, etc.) have grown exponentially over the last ten years. Everyone wants a slice of their daily schedule. One CEO told me, “For each available day, I have potentially 2 or 3 days of meetings and phone calls that could be scheduled.”

They have their own priorities, and can be very tough about keeping a singular focus on them. Most top executives, typically, are personally working on no more than 3-4 important strategic initiatives or projects at a time. That said, their short-term needs and priorities may fluctuate from day to day.

More so today than every before, executives feel a need to exercise impartiality and fiscal responsibility when it comes to awarding major contracts. They know that their decisions may be subject--now or later--to intense public scrutiny. In the wake of many recent corporate scandals (Enron, Tyco, Healthsouth, Worldcom, etc.), they are wary of appearing to be too close to any one supplier of products or services.

Some CEOs strongly believe in delegating operational decisions to their executives. They consciously avoid getting involved in the hiring of professionals or suppliers. Only for bet-the-company decisions (an acquisition or radically new strategy, for example) will they get involved in these choices.

Sometimes, the CEO has to keep lots of different constituencies happy (the government, a board member, a firm that did her a favor, a top executive she is trying to retain, you name it). She may act behind the scenes to influence a decision, but bend over backwards to appear publicly neutral. Outsiders are often unaware of this balancing act.

CEOs—and other economic buyers--are concerned about return on investment and alignment with strategy. They are asking, “Is this a good investment for the corporation?” and, “Does this support our key strategic initiatives?” They don’t care—unlike User Buyers (the executives who work with you on a daily basis)—if you’re a nice guy, if your methodologies are avante garde, if you have an office in Shanghai, and so on.

Next, why do you want to meet with the CEO? Is it because you’d like to do business with a prospective, new client, and want to meet the CEO or other executive who sets the strategic agenda for the company and makes the ultimate decision to hire firms like yours? Or are you perhaps making a specific proposal to your client, and the CEO (or other top executive) is indeed the economic buyer--he/she will say yes or no to your proposal? Maybe you’d like to do work in other parts of the organization, and you need access, visibility, and knowledge to accomplish this--your firm has broad capabilities, but you are only utilizing a narrow slice of them in your current role. Is it for defensive purposes—to counter a threat from a competitor who is more plugged in than you at the top of the organization?

The point is, be clear about your motivations and whether or not you really need to meet with the CEO. For example: there may be times when it is NOT a good idea to have a relationship with the CEO. Suppose he is retiring (or will be fired) in 6 months? What if you’re better off if the CEO is not aware of the extent of your work with his company? What if the CEO came out of a firm that competes with yours, and has strong biases against your company? Could a relationship with the CEO taint you, for some reason, in some parts of the organization? And so on.

It’s also important to understand why you cannot get access. Here are some typical reasons--including a surprising one:

Your day-to-day client is blocking you, explicitly or implicitly. He doesn't want you to go around him to meet with or deal directly with the CEO.

You just cannot get on the CEO's agenda, despite asking. You have no sponsor, as it were, to position such a meeting with the CEO. The CEO doesn't know you at all or doesn't think you are important enough to meet with.

The CEO specifically DOES NOT want to meet with you. He may perceive that to do so would undermine his fiscal neutrality and/or that his subordinates should manage the relationship with you. There may be other reasons, as well, of which you are unaware.

You haven't tried. This may sound ridiculous, but sometimes when people tell me they cannot build a relationship with the CEO, I ask, "How many times have you tried to set up a meeting?" And sometimes the answer is, "Well, we really haven't tried. We don't know him." It reminds me of the old joke about a man, Bill, who prayed every night to win the lottery. "Dear God, please let me win the lottery," he would implore God each night before going to bed. Finally, after 20 years of praying, he gets angry and shouts out to God, "Why can't you let me win the lottery? What's wrong with that? Why can't you let me win? I've been a good man. I've been faithful to my wife and attended church every Sunday." Suddenly, he hears a deep voice coming from high above: "Bill, give me chance. Buy a ticket!"

Once you've clarified why you really need to meet the CEO, and you've articulated the barriers standing in front of you, you can select the right strategies to gain access.

As I mentioned at the beginning, what's important here is, "What would interest the CEO in meeting with you?" In essence, he must feel a meeting is compelling from either a professional or personal perspective. Your topic, and the information the CEO expects to get from you, must be perceived as advancing the company's strategic agenda and/or the CEO's career or personal life. You must truly evoke his curiosity that there is something to be gained by making room on his calendar for a meeting with you.

So how do we get on his agenda? Here is a list of suggested strategies:

Get an external sponsor to introduce you. This could be a retired executive that is still close to the CEO, a board member, another client of yours, a client of one of your colleagues, or someone else that the CEO knows and trusts. Plumb your network, and other's networks that yours overlaps with, to find an intersection point. You are probably only a couple of introductions away from the CEO, but don't know it.

Gain a social or personal introduction to the CEO. Is there a particular interest that you might have in common? A non-profit or charitable cause that you can connect through? Do you have a common friend? (By "you" I mean you personally or someone in your firm, if you work with an organization). One client of mine has been very active in the World Economic Forum, for example, and has made several important connections to CEOs through that organization.

Do something dramatic or crazy to grab the CEO's attention. Another client of mine got a meeting with the then-CEO of Southwest Airlines, the legendary Herb Kelleher, by having one of their young associates dress up in a turkey costume and run around in front of the airline's headquarters building. Kelleher, a lover of Wild Turkey Scotch, was amused and tickled by the stunt, and later became a client of this firm.

Leverage your way into the company through a more junior executive. This may be an easier entry point to establish. You may be able to meet with a functional head or business unit head, and from there gain access to the CEO.

Find out, through individuals who know the CEO and through publicly available information, what his critical interests and priorities are. Identify something unique or unusual that you can offer him around one of these interests or priorities: Powerful market data, a new piece of research, a set of interview findings, and so on.

Try to identify something that you/your firm is unique or highly differentiated at. When a CEO is already using 2 or 3 firms in a given market or product area, you've got to demonstrate that you are really different or new in some way if you want to get his attention.

If there are strong incumbent competitors, think about a small, non-threatening initiative you can engage around—ideally something that fits the criteria in (6) above. If a CEO feels she has to displace an existing advisor or key supplier in order to hire you, then it's going to be a tough sale. If she can hire you without kicking out the others, it's going to be a lot easier.

Create an event that you can invite the CEO to. It needs to be a compelling occasion, however. It could feature a well-known speaker or famous academic, for example, that you know will appeal to the CEO. Ideally, it will include other top executives that the CEO would like to meet. This goes under the general theme of connecting the person you want to meet into your or your firm's broader network of contacts. Does this sound like an expensive and time consuming option? Of course it is. You need to think about the extraordinary value of a single CEO relationship, however, and what you're willing to do to build it.

Identify a business opportunity for the CEO's company, and try to create a meeting around it. This could be a joint venture, new service/product opportunity, a meeting with another company that you think could be a business partner, and so on.

Find out where the CEO spends his time. Are there certain conferences he attends? Try to become a speaker at one of them. Are there certain publications he routinely reads? Try to get published in one of them. Is there a club he belongs to? Join it. (If this sounds extreme, it's not—I've heard of people managing to get themselves booked into airline seats next to an executive, in order to meet them).

Be persistent! The CEO of a \$12 billion financial institution told me this recently: "You have to realize that, as CEO, your short term priorities shift from week to week. Your topic may not be of interest today. But in a month, you might grab my attention. Don't give up. Also, the more you understand about my needs, interests, and goals, the more you'll understand how to connect with me and align with my agenda."

If you are already working for the CEO's company, there are additional strategies you may need to contemplate:

Get an internal sponsor or coach to organize the meeting. Someone who the CEO trusts has to say, "I'd really like you to meet with these guys." The message could be, "They've got some interesting things to say about X," or, "Before we move ahead I really would like your advice and support, and meeting them is

important...”

Insist on meeting the CEO during the proposal process, or at least during your current engagement. You have to be able to articulate to your work-with client why this will support what you’re doing and also be good for her visibility.

Try to arrange a meeting when you have finished a major project or transaction. Again, position the event as good PR for your immediate client and the work you’ve done together and results you’ve achieved.

Bring in a colleague to lead the meeting with the CEO. This may be less threatening to your own client, who may want to own the relationship.

Arrange a non-threatening first meeting that focuses on research or writing. I have, for example, interviewed dozens of CEOs for my books and articles, and in some cases this first contact has led to a longer-term relationship. Sometimes I’m turned down, but very often I’m not. The idea of contributing to a book or article can be appealing to a top executive, assuming the topic is of interest to them.

In your own behavior, exemplify client advisor attributes: Ask great questions and listen, show that you are a deep generalist and not just a narrow “expert,” build personal trust, demonstrate independence, build deep client knowledge, and so on. If you bring big picture thinking to your immediate client, you are far more likely to gain access to more senior levels of the organization.

Have a very senior executive from your company, for example your CEO, set up the meeting. This is, of course, an old strategy that’s been used by companies for years. Some executives are even jaded by it—the CFO of a one of the largest telecommunications companies in the world told me this: “I’m looking at whether the meeting is really relevant to my company. Is it a fresh idea, or a new spin on an old idea? If they’re calling to say that they’ve just been promoted and have never met me, or that their boss is in town for a few days and wants a meeting, well, that doesn’t get into my diary!” If you are going to use this strategy, then by all means create a focal point around the visit that goes beyond just meeting with a higher-up in your company.

In summary: Work to understand the CEO’s agenda, his priorities, and interests. Be creative about networking your way into a connection with her. Get a sponsor or coach who can help you navigate your way. Think long and hard to identify a compelling idea, issue, or proposition that will grab his attention. And finally, buy yourself a ticket—try! —and don’t give up if you’re rebuffed on the first or even the third or fourth attempt.

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