

# How to Find Training and E-learning Decision Makers

Part 2 in a 2 part series

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To quickly recap part 1 of this article from last month's *Training Growth Innovations*:

- Most lists of prospects do *not* include the e-learning or training decision maker
- You can begin the "digging" process with the VP/Director of HR
- You must decide whether to look at the corporate or the divisional level
- There is *no universal title* to search for, but the three most common are:
  - Director of Training and Development
  - Director of Organizational Development and
  - Director of E-learning

Moving forward, **your job is to find the most senior level person(s) who work in this capacity—whatever their title.** Since titles will vary from company to company, you need to be flexible. Remember the BIG picture: You are trying to find the key "influencers" involved in projects. Who are the people on the committees? Who are the people talking with vendors?

Your **best friend** when trying to obtain information is the receptionist. This is your first connection with the company—and the one you initially need to question in order to be directed to the right person. It is vital that you address this person with a pleasant and appealing tone, and if possible, by their first name—this can make all the difference in the world! In most cases, they are willing to help you and give you the name of the person who has taken over the position. By the way, people skills count! *Finesse, diplomacy and basic courtesy and kindness will go a long way.*

## Getting transferred to the VP of HR.

When you get voice mail, *don't leave a message!* Instead, try to get their Assistant. If you get their voice mail—again, skip it—you *need to talk to a live person!* Instead, dial 0 (another best friend) to go back to the receptionist (most times). Then, explain that you got voice mail and you didn't leave a message because you want to make sure that this is *the right person*—the one who oversees training. If the company has a training department, the receptionist may respond with

something like, "Well, we do have a 'VP of Training'" and provide you with contact information. Sometimes, she may just connect you to the training department—perfect! In many cases, you can now find the right contact. Sometimes this contact, say, the VP of Training, may have assigned all training projects to another member of his/her staff, the Director of Training & Development, for example, and will advise you to direct all training inquiries to this person.

### **When you have no contact information.**

A good way to start is: "Hi, I was wondering if you can tell me who the Director of Training and Development is?" Although there are many, *many different titles* for people who head up this area, this is a good, generic start. The response may be, "Training for what?" In this case, your response could be: "What is the largest training area within your company?" This is a good starting point to obtain a contact name.

### **"Company policy—no contact, no information"**

Dealing with the **gatekeeper** is one of the toughest, most exasperating aspects of "digging." They are the company "police", and many of them *enjoy* playing that role. The gatekeeper informs you: "No name, no information provided—company policy." You can respond by saying, "Can you please connect me to your HR department?" Their response—"I'm sorry—company policy; I cannot connect you to anyone without a contact name." This is a typical **dead end**—very tough to bypass. Try calling again in a few days; there may be a chance that someone else may be covering the phones while the receptionist (gatekeeper) is on break, and is either not familiar with company policy or not as strong an enforcer.

### **When they won't give names—but WILL transfer you**

Sometimes the company policy is they can't give out any names over the phone, but they *can connect you* to that person or department. This **roadblock** is very common. Sometimes you get that person on the phone, but most often you get their voice mail. When the voice mail message does not identify the person, but only states an extension number—you should transfer back to the receptionist. You could say: "I didn't get the name of the person, but I would like to send information." You'd be surprised how many times you can obtain the name and title from the receptionist/gatekeeper.

### **Dealing with the automated attendant**

This is great if you already have an extension number or the person's name, but can prove to be another time-consuming obstacle when you don't. If you have no information, you can sometimes hit 0 to reach an operator. Sometimes, you'll get: "This is not a valid feature, no operator available. Goodbye." Now check if the system is voice activated; where you can specify a department and get automatically transferred. It's important to remember that there is *almost*

*always* a way to connect with the operator. This may, however, require you to listen to the entire long and drawn-out message again.

### **Dealing with rejection**

Once in a while you come across someone who is miserable and nasty to you. When you first encounter this, your first reaction may be one of shock—or you may be mortified that someone would speak to you in such a tone. Your patience and self-control are truly tested! But it's important to remember that people are people—and sometimes you may catch them in an "off" moment. Forget it. Don't let it sway you. Count to ten and move on to the next person on your list to call! Remember. It's a numbers game.

### **In summary, the key to success in finding decision makers is to:**

1. Accept that it is going to be time-consuming,
2. Have a positive attitude,
3. Be kind and courteous,
4. Be flexible and creative, and
5. Develop your own personal style.

It is absolutely amazing what you can do when you have a positive attitude and enjoy what you do. So, have fun with this! The results will follow.

We hope this sheds some light on this subject, for those individuals who spend lots of time "digging" for decision makers. We have kept a few of our "techniques" undercover, as you might expect. We can't reveal all our secrets—we might be calling *you* tomorrow!

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