



# How to Get a Meeting with District Administrators

Selling to Schools founder Glen McCandless interviews school sales and education marketing expert Deb deVries.

**W**e hear frequently from sales reps and managers who have questions about how to get a phone conversation or set up meetings with senior level school administrators. Why? Because getting through to senior decision makers is tough. People who manage school districts protect themselves and their busy schedules from interruptions. Deb DeVries, a K-12 industry sales veteran, has practical advice based on many years working with district administrators.

**Q. What is the best way to get through to senior school administrators given the gatekeepers and the more aggressive screening of “junk” communications?**

Sending something to them in the mail, whether “snail mail” or email, may not work. My experience is that their mail is sorted by the “gatekeepers” or directed to a spam folder, and yours will likely never get to the senior school administrators. The best way to get through is by a combination of methods that includes live communication—by making a phone call or by meeting them in person at functions the senior school administrators attend.

**Q. How do you deal with assistants and other “gatekeepers” who limit access to the decision makers you want to talk to?**

Getting on a first-name basis with the gatekeepers is critical. It is worth the time to find out who the gatekeeper is. If you’ve met with a senior school administrator at a function, getting permission to follow up is generally not a problem. Ask the administrator for his or her assistant’s name so you can make contact directly to schedule a meeting, determine what documents need to be sent, or to ask advice about what the next step will be.

My experience is that you want to deal with the assistant or secretary directly and

establish a relationship that implies both of you are working together to respond to the senior school administrator’s directives. If you were establishing this relationship on your own, I would call the district office and ask for the name of the assistant or secretary. I would then call that individual, introduce yourself, indicate that you have information the district wants to see, and that you have a desire to learn more about the district.

Whatever your plan is, be very direct with your desire not to waste anyone’s time, and ask for his or her help in accomplishing that goal. This is not a one-time call. It is easier to do if you have met the senior school administrator and received the name from him or her. If you haven’t received this information from the senior school administrator directly, starting by simply introducing yourself is not a bad idea. Be sure to send a thank-you note with your business card. This lost art really has an impact. Call the assistant back a week or two later and take the relationship to the next step.

**Q. Once you are able to communicate with a senior school administrator, either on the phone or in person, what do you say to get his or her attention?**

I am a big believer in not assuming that you (as a supplier) have the solution to a senior school administrator’s needs. For that reason, I would request time (ideally in person) or on the phone to ask questions that bring out the critical issues and needs the district has, and determine if there is a fit with your company’s core competencies. This needs analysis must happen before you talk about specific products; it’s presumptuous to offer what you think the district needs before you have heard what the priorities are from the perspective of the senior school administrator.

I would also do my homework—research the school Website and any other public

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## Spotlight on Stephen Martin, MBA, RSBA: Leading Technology



If you had to name one thing that has significantly affected education in recent years, technology would likely top the list. When it comes to forward-thinking ideas in technology, Stephen (Steve) Martin is a true leader.

For many years, Steve led a variety of technology efforts in the private sector before joining Litchfield School District in Litchfield, New Hampshire, in 2004 to put his knowledge to use. Two years ago he came head to head with a major issue: the district's original network, launched in 2000, had reached critical mass.

"All resources had been geared toward the end user without creating a solid infrastructure to support the items in use," Steve says. The network was very slow and connectivity was sketchy. Employees frequently were unable to access the network and email; data was lost, leading to the need for retesting. Frustrations ran high!

Steve met with his administrative team and developed a plan to get the necessary data to articulate the problems and define their impact on both educational and business operations as well as outline a justifiable plan to resolve the problems. An outside consulting company completed a detailed network

audit to verify problem areas, giving the issue public visibility in anticipation of future expense requests. The findings were clear: the district's network was broken beyond repair.

Prioritized recommendations allowed the most critical problems—not the least of which was securing funds—to be addressed. To effectively sell their solution, Steve and his team made it clear to the school board and community the impact these problems would have if left unaddressed and formed an implementation plan to be carried out over three years.

Each phase followed the consultant's prioritization and included clearly defined benefits for each component. The first two phases were successfully implemented in the 2009–2010 and 2010–2011 school years; the third, slated for the current school year, has been delayed due to budget constraints. Steve hopes that the efforts being put forth to pass the 2012–2013 budget will put the final phase back online.

It takes a combination of skills to be an effective leader. For Steve, one of the most important skills is the ability to make a decision. He recalls a graduate school professor who said that the worst decision any manager can make is not to make a decision. "That has stuck with me ever since," Steve says. "You need to gather as much information as you can, assess the situation, make a decision, and move forward."

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documents. Don't ask questions if the answers to your questions are readily available to you on publicly accessible channels. You want to hear from the senior school administrator what the critical issues are—straight from that person—the good, the bad, and the ugly.

You should spend a lot of time crafting the questions you plan to ask this person so by the end of the conversation you have a clear understanding what the pain and the proud points are for this district. You might think this is common sense, but you would be surprised how few companies/sales people do this and how thrilled most senior school administrators are to be asked these questions.

I would follow-up with a letter documenting what you heard and asking for confirmation that you heard correctly, and then ask permission for the next meeting to show where there might be some synergies between the needs and your company's products and services.

And I would call the gatekeeper to let him or her know that the letter is coming, that it was requested by the senior school administrator, and ask him or her how to ensure it gets to the administrator in a timely manner.

**Q. What are the most important things to consider when selling to senior level district administrators?**

Senior administrators are extremely busy people. Everyone is calling them and sending emails to them

and they hate being "sold to"—don't we all? I think they typically find that sales people who call on them have not taken the time to learn about their district and they are calling them to introduce a product and make a product or company-oriented presentation too early in the process. They also know that vendors have been told that school districts have moved to decentralized decision making, that they may not need to involve the superintendent office. WRONG! I always go through the process I described. The superintendent or other senior level administrator will let you know if you should include other staff and, most important, give you permission and direct their staff to work with you.

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**Glen McCandless** is publisher of *SellingToSchools.com*, an online resource center for sales and marketing professionals that serve the education industry. Glen is a member of the Education Writers Association and serves as a consultant to educational publishers and developers of digital products and services for schools. He is a former education marketing specialist for Apple.

**Deb deVries** has a master's degree in education and over 20 years of experience in the education industry. She was a special education teacher in Utah, Washington, and Minnesota before joining the private sector, with executive positions at MECC, The Learning Company NetSchools Corporation, PLATO Learning and Pearson. She currently is vice president of Marketing for SkillsTutor.

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