Category

Consulting

Trusted Advisor Account Growth & Client Retention Playbook

Growing from project delivery to long-term partnership without it feeling like a sales push

- Practitioner
- Intermediate
- Template Included

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- 4 minute(s)

Overview

A framework for growing a client account from single-project delivery toward a long-term trusted advisor partnership, using genuine value demonstration and organic conversation rather than a scripted upsell approach that undermines the trust being built.

Isn't account growth inherently in tension with trusted advisor

status, since it involves selling more work? Not inherently — the tension arises specifically when growth is pursued through scripted upselling disconnected from genuine client need. Growth that follows naturally from demonstrated value and genuine ongoing problem-solving is consistent with, not opposed to, trusted advisor status.

How do you propose additional work without it feeling

self-interested? By connecting any proposed additional work explicitly and honestly to a genuine need you've observed, and being willing to say when additional work ISN'T warranted — covered directly in the framework below.

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