Category

Consulting

Trusted Advisor in Long-Term Strategic Accounts Playbook

Sustaining genuine trusted advisor value across years, not just achieving it once and assuming it persists

- Practitioner
- Advanced
- Template Included

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- 4 minute(s)

Overview

A framework for sustaining genuine trusted advisor value across a multi-year strategic account relationship — actively refreshing relevance, avoiding complacency, and managing the specific risks that accumulate over long tenures — since trusted advisor status achieved early doesn't automatically persist without continued deliberate investment.

How is this different from the Trusted Advisor Relationship

Lifecycle Playbook? That playbook covers the general engage-grow-renew stages applicable to any relationship. This one is specifically focused on the unique risks and dynamics of a genuinely long-term (multi-year, often 5+ year) strategic account, where

different challenges — over- familiarity, relevance decay, complacency — emerge that shorter relationships don't typically encounter.

What's the biggest risk specific to very long-term advisor

relationships? Relevance decay — the advisor's thinking and approach becoming comfortable and familiar but no longer as sharp or current as when the relationship was newer, often without either party fully noticing the gradual decline.

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