Category

Consulting

Trusted Advisor Relationship Lifecycle Playbook

Managing the relationship deliberately through its distinct stages — engage, grow, renew — each with different priorities

- Practitioner
- Intermediate
- Template Included

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- 4 minute(s)

Overview

A framework for managing a trusted advisor relationship across its distinct lifecycle stages — initial engagement, growth, and renewal — recognizing that each stage has different priorities and risks, rather than applying the same relationship management approach uniformly throughout.

How is this different from the Trusted Advisor Account Growth &

Client Retention Playbook? That playbook focuses specifically on the growth behaviors and mindset. This one takes a broader lifecycle view across all three stages — engage, grow, renew — recognizing that the priorities and risks differ meaningfully at each stage, not just during the growth phase.

Does every client relationship go through all three stages

predictably? Not always in a clean linear sequence — relationships can cycle back to an "engage"-like stage after a significant change (new client sponsor, major scope shift), which this playbook addresses as a recognized pattern, not an exception to plan around separately.

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