A COMPANION TO THE INVITED ADVISOR

The Invited Firm

What it takes to convert a traditional professional services organization into one that gets invited

The Invited Advisor set out what executive engagement now requires. This paper takes up the harder problem: how a firm becomes the kind of organization that gets invited, an operating-model change across governance, compensation, systems, and leadership.

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> *The Invited Advisor set out what executive engagement now requires. This paper takes up the harder problem behind it: how a firm actually becomes the kind of organization that gets invited. The answer is not a training program. It is a change to the* ***operating model****, to governance, compensation, systems, and leadership, that surrounds the mindset and behavior and determines whether they survive. A firm that teaches the skill but leaves the system untouched gets a brief afterglow and little else. This is our account of what it takes to make the change hold.*

The distance between knowing and being invited

Our companion paper made the case that information parity has changed what earns a senior executive's attention, and that the firms that will grow are the ones whose people are wanted in the room. Naming that is the easy part. The hard part is that most firms, faced with a growth challenge, reach for the same instruments every time: train the individuals. Send the Partners to a program, teach the skills, and hope it takes.

It rarely does, and the reason is not the quality of the training. It is that a professional services firm is a system of incentives, governance, tools, and long habits, built and tuned for a different era, and the system always wins. You can teach a Partner to open with insight and engage leader-to-leader, but if origination credit, utilization targets, and practice-line economics all reward the old behavior, that Partner will, quite sensibly, revert. To change what professionals do, you have to change what the firm rewards, makes visible, and leads them toward.

Becoming a firm that gets invited is, therefore, an operating-model change, not a curriculum. The six-stage framework below is the teachable core, the mindset and behavior. But properly aligning the organization's governance, compensation, systems, and leadership is what makes it stick. Treat them as optional, and the framework becomes one more binder on the shelf.

Why the traditional firm resists the invitation

It is worth being precise about what the new behavior is traditionally up against, because the resistance is not only attitudinal. It is structural. Where it remains in place, the classic professional services operating model undermines the Invited Advisor in at least five ways:

- **Origination credit rewards solo hunting.** Historically, "eat what you kill," economics have rewarded the individual who originates and quietly ignores the Partner who shares a relationship or makes an introduction, the very behavior that one-firm growth depends on.
- **Utilization culture crowds out client development.** When the billable hour is the unit of value, client development has historically been treated as unchargeable overhead. The urgent and chargeable reliably crowd out the important and relational.

- **Practice silos punish collaboration.** Service-line P&Ls make cross-service collaboration an act of generosity that the numbers don't reward, so it depends on goodwill rather than structure. Service line leads often challenge individuals who do not focus exclusively on service line growth.
- **Growth is treated as individual heroics.** The rainmaker is celebrated, but the capability is rarely institutionalized or developed, and it walks out the door at retirement.
- **Firms manage to lagging indicators.** Closed revenue and realization are easy to measure, so they become the focus, while the leading behaviors that actually produce invitations are often untracked and uncoached.

None of this is dysfunction. It is a coherent system that has worked when information asymmetry made the lone expert-seller enough. Parity broke that premise, and the same coherence that once drove growth now works against it. That is why the evolution has to reach the system itself.

The framework: six stages of client development

SGA has identified the mindset and behavior that need to be developed today as a six-stage architecture. Each stage pairs a mindset or method with the specific things for professionals to adopt in practice. This architecture should underpin their developmental curriculum at every career level, creating a single shared language for growth across the organization.

STAGE 1

Mindset & Orientation

THE LEADERS' MINDSET©

Adopt an advisor-first orientation; understand how clients create value; build hypothesis-driven curiosity; and model growth as a form of leadership.

STAGE 2

Client Intelligence

EARNING CXO TRUST

Research client priorities and pressures; map the stakeholder landscape; identify whitespace; and prepare a Mindset Mapping© hypothesis.

STAGE 3

Relationship Development

THE LEADER-TO-LEADER CONVERSATION©

Open with insight rather than agenda; apply the Five C's of Executive Engagement©; deepen trust across interactions; and expand senior relationships.

STAGE 4

Cross-Firm Collaboration

ONE-FIRM GROWTH

Identify cross-service opportunities; credibly introduce colleagues; coordinate multi-service proposals; and apply Interpersonal Intelligence©.

STAGE 5

Opportunity Development

SHAPING & ADVANCING

Qualify with client-centered criteria; shape and frame the opportunity; advance it through the client's decision process; and track the pursuit in the firm's tailored CRM system.

STAGE 6

Reinforce & Sustain

COACHING & ACCOUNTABILITY

Maintain a structured coaching cadence; track leading behavioral indicators; share Partner application stories; and deliver quarterly reinforcement.

In each instance, this framework needs to be given a name and a visual identity that belong to the firm, so that it becomes an organizational identity marker rather than a training artifact, and every tool, guide, and facilitation resource is 'owned' by the firm, so the capability persists independent of any outside provider. That is the mindset and behavior. What follows are the four components of the operating system needed to keep it alive.

I. Governance

The first component is the one that most directly addresses the traditional model, and the one that historically autonomous Partners are at risk of underestimating: governance. When no one owns client development as a firm-wide capability, when no one has "the badge and the gun", it remains the diffuse responsibility of every Partner, which makes it the responsibility of none. Attention is needed.

1. **Give the capability to an owner.** Name accountable owners, for client development as a firm-wide capability, for key accounts, and for one-firm growth, so the work has somewhere to live other than in everyone's good intentions.
2. **Define contribution at every career level.** Growth stops being "what Partners do when they have time" and becomes a defined, appropriately scaled expectation at each level, so the capability is built over a career rather than bolted on at partnership.
3. **Create account governance that spans the silos.** Account teams and relationship owners coordinate across service lines, giving Stage 4 collaboration a structured way to operate rather than relying on personal goodwill.
4. **Manage leading indicators.** Governance reviews the behaviors that produce invitations, senior relationships developed, insight-led meetings held, introductions made, not only the revenue that eventually results.

This is the shift from a varied, federated, origination-driven model toward coordinated, accountable, firm-wide growth. Without it, the other three components have nothing to anchor to.

II. Compensation and recognition

The second component is the hardest, most political, and decisive. People do what they are paid and recognized to do. As long as origination credit dominates, the invited-advisor behaviors, sharing a relationship, making a cross-service introduction, investing in a senior relationship that pays off years later, are, to any individual, irrational. Compensation has to stop punishing them.

1. **Reward collaboration, not only origination.** Shared credit for team pursuits, and explicit recognition for the introduction that opens a colleague's door, so one-firm behavior is economically rational rather than charitable.
2. **Recognize leading behavior, not only closed revenue.** Tie advancement and recognition in part to demonstrated client-development behavior at each level, so the capability is rewarded as it is built, not only when it finally shows up in the numbers.
3. **Make it legible and lead it from the top.** Compensation is the most charged lever in any partnership; the change must be deliberate, phased, and visibly championed by firm leadership, or it stalls.

You cannot exhort your way past the compensation plan. When the framework and the incentives disagree, the incentives win, every time.

III. The systems people already use

The third component concerns the operating system in which the work actually occurs, so it stops being something people remember from a workshop and becomes part of how the job is done.

1. **Build it into the CRM.** The six stages need to be embedded in the firm's CRM and management systems, so client development is tracked through the tools people already use rather than through a parallel reporting burden that quietly dies.
2. **Connect the right stages.** Stages 2, 5, and 6, client intelligence, opportunity shaping and advancement, and reinforcement, map directly to AI-enhanced CRM activity, making the behavior visible and therefore coachable.
3. **Track signals, not vanity metrics.** The system captures the leading indicators that predict invitations, giving coaching something concrete to work with rather than a revenue number that arrives too late to act on.
4. **Let AI do the heavy lifting in the workflow.** AI supports Stage 2 (client intelligence preparation) and Stage 5 (shaping and advancing) within existing workflows, so professionals arrive better prepared with no additional effort.

Embedding the framework in the CRM system in this way reinforces it through the work itself rather than competing with it for attention.

IV. Leadership: the reinforcement that makes it stick

The fourth component determines whether the first three survive a busy quarter. Skills atrophy without reinforcement, and reinforcement is a leadership behavior before it is a program.

1 **Cadence-coach to the framework.** A structured coaching rhythm replaces occasional, generic performance conversations with regular, specific ones.

2 **Use the framework as the coaching lens.** “At which stage did this conversation stall, and why?” is a far more useful question than a generic review, it accesses the coachable moment.

3 **Keep it alive between formal events.** A monthly digest of relatable Partner application stories keeps the framework present and credible, firm-specific proof, in colleagues’ own words, that it works.

4 **Model growth as leadership.** The most powerful reinforcement is senior people visibly practicing Stage 1, treating growth as an act of leadership rather than a chore delegated downward.

Reinforcement is not the final step in a sequence. It is the condition under which everything else holds.

Why all four move together

The six-stage Client Development framework is the mindset and behavior. These four components (governance, compensation, systems, and leadership) are the needed operating system around them. Pull any one, and the others sag. Train the skill, but leave compensation untouched; Partners revert. Fix compensation, but skip the systems, and you cannot see or coach the behavior. Embed the CRM but neglect leadership, and the data goes unused. The firms that deliberately address these four components are treating client development as an institutional capability to be engineered, not a talent to be hoped for.

The leading firms are already moving

None of this is hypothetical, and none of it is far off. The model described here still prevails across most of the profession, the autonomous Partner, the origination-driven compensation plan, the federated practice line, but its hold is loosening, and a growing number of firms are already making precisely these moves. Some have created a dedicated growth leadership role, charging a Chief Growth Officer with owning client development as a firm-wide capability rather than leaving it to individual rainmaking, the governance shift in its clearest form. Others have taken on the hardest component first, rebuilding Partner compensation to reward collaboration, introductions, and the development of others, and deliberately retiring the pure “eat-what-you-kill” formula. And the wave of private-equity capital now reshaping firm ownership is, whatever one finally makes of it, importing exactly the professional management, centralized systems, and firm-wide discipline that the partnership model has historically lacked.

The point is not that the change is optional or distant. It is that the change has already begun, and the only real choice is how a firm meets it, by authoring a coherent operating model of its own, deliberately and on its own terms, or by having a version of one imposed piecemeal, late, or by an outside owner whose priorities are not the firm's. The four components above are the deliberate path. The firms that move first, and move on purpose, will shape what an invited firm looks like before the choice is made for them.

Where this leads

This approach represents a shift from a firm that sells to one that leads and gets invited. It is an operating-model change made deliberately, not a program run once and forgotten. The Invited Advisor outlines what the information parity era asks of the individual. This is what it asks of the firm.

> *A firm does not become invited by teaching its people to ask for the meeting. It becomes invited by building itself, deliberately, into the kind of firm a leader wants to see again.*

SGA Csuite.com BECOMING THE FIRM THAT GETS INVITED