WHAT CLIENT DEVELOPMENT NOW REQUIRES

The Invited Advisor

Executive Engagement in the Age of Information Parity

A point of view on what now earns a senior leader's attention when information is no longer scarce, and the approach we believe today's environment calls for.

Read online at csuite.com →

IN BRIEF

For most of the history of professional selling, the seller held an information advantage, they arrived knowing more than the buyer, and the most influential methods were built to exploit that edge. In the last eighteen months, that advantage has collapsed. Artificial intelligence has completed a shift Daniel Pink named more than a decade ago: the age of Information Parity, in which the executive across the table arrives as well informed as the advisor, and very often better informed about their own situation.

Our assertion is this: when parity removes the seller's traditional edge, what the moment calls for is not a sharper technique but a different way of thinking about the meeting itself, what it is for, how you prepare for it, and how you conduct it. The purpose of a senior meeting is no longer to inform, to persuade, or to take control. It is to become someone a leader wants more of, to be invited back. We call the approach built on that purpose The Invited Advisor™.

This paper makes that case and sets out what it requires. In the pages that follow you will find:

- **Why the advantage has gone** what changed in the last eighteen months, and why the methods engineered to exploit information asymmetry, SPIN and The Challenger Sale, were the right answers to their era but rest on a premise that no longer holds.
- **What endures** why one body of work, The Trusted Advisor, is vindicated rather than retired by parity, and which parts of trust now carry the decisive weight.
- **The shift from permission to desire** why the old test, would you see them again?, no longer predicts anything, and why the real test is now do you want to see them again?
- **What the approach requires** the three things The Invited Advisor is built to develop: a different mindset, a different preparation, and a different conversation, and the single human thread that runs through all three.
- **Why AI is the enabler, not only the disruptor** how the same tools that dissolved the old advantage make the new one possible.

If the argument holds, the conclusion is practical: parity removes the old competitive edge, and attunement, being genuinely prepared for this leader, and additive to their thinking, becomes the new one.

What the meeting must now become

We do not arrive at this claim from theory.

For decades we have occupied an unusual seat: observing senior sellers in some of the world's leading professional services and technology companies as they attempt to engage senior executives, across thousands of simulated meetings spanning industries, geographies, and cultures, each one staged as faithfully as we could. At the end of every meeting we asked the executive a single, revealing question: would you grant this person another meeting? Answered honestly and at scale, that question has taught us a great deal about what executives genuinely respond to, and about what they quietly tolerate, decline, or simply forget.

In the last eighteen months, the answer to that question has changed, and so has the question worth asking. The information advantage on which generations of selling methods were built has largely dissolved. That leaves us with a claim we want to put plainly before substantiating it, rather than build toward slowly:

When the executive across the table is as well informed as the advisor, the response that works is not a better technique layered onto the old purpose. It is a different purpose, which reshapes everything downstream of it. A meeting is no longer an occasion to reveal what the executive does not know, because there is little left to reveal. It becomes an occasion to be wanted again. That single change in purpose asks for three things at once: a different mindset, a different preparation, and a different conversation. The rest of this paper substantiates that claim, first by showing how the ground shifted, then by setting out what the shift now requires.

What has changed, and why the old advantage has gone

Both sides of the table are now prepared. Sellers, predictably, have reached for AI to research faster and deeper than before, the company, the market, the executive, and the likely competitive set. What is new is that executives are increasingly doing the same thing. They arrive more often having already analyzed their own situation, mapped their options, heard from competitors, and pressure-tested the obvious answers, often with tools as capable as the seller's. The broader market is moving the same way: across successive Gartner surveys, the share of B2B buyers who prefer a largely rep-free, self-directed buying experience rose from 61% in 2025 to 67% in 2026. Buyers increasingly prefer to inform themselves before engaging a seller at all, and the executive suite is no exception.

61% → 67% The share of B2B buyers who prefer a largely rep-free, self-directed buying experience, up from 2025 to 2026 across successive Gartner surveys.

The practical consequence is striking. The seller who once created value chiefly by bringing information now frequently finds the executive already has it. The meeting that used to begin with the seller revealing something now begins with an executive who has, in effect, read everything. The old opening moves no longer land, because there is little left to reveal.

This is the condition we call Information Parity: the working assumption that the executive across the table has as much information as the seller, and about their own situation very often more. It is not a refinement at the margins. It removes the foundation on which several of the field's most respected approaches were built. When the asymmetry goes, the techniques designed to convert it lose their leverage, however well executed. The question is no longer how to wield an advantage the seller no longer has. It is what creates value for an executive who is, on the facts, your equal or your better.

> *The question is no longer how to wield an advantage the seller no longer has, it is what creates value for an executive who is your equal or your better.*

Methods built for a world that has changed

SPIN was, and remains, an elegant achievement. Its sequence of questions surfaced needs the buyer had not yet fully articulated; it monetized a questioning advantage. But when the executive has already carefully diagnosed their own situation, a disciplined sequence of questions can feel less like discovery and more like being guided toward a conclusion they reached before the meeting began.

The Challenger Sale shifted the edge from questions to insights: teach the customer something they had not considered, reframe their thinking, and take control of the conversation. It was powerful precisely because commercial insight was scarce and hard-won. Insight is no longer scarce. An executive can generate a provocative reframing of their own industry in seconds, and "taking control" reads very differently to a leader who arrives holding more information than the person attempting to take it.

None of this is a criticism of either method. Each was the right answer to its era, and each still rewards careful study. The point is that the era has moved, and the premise both methods share, that the seller knows something the buyer does not, is no longer true.

None of this would have surprised Daniel Pink, who saw it coming. More than a decade ago he observed that selling was moving from information asymmetry to what he called "information parity," a world in which buyers would arrive as prepared as sellers, and he was right. The shift has accelerated faster than almost anyone expected. What Pink could not yet chart was how parity would behave at the very top of the house. In the access-scarce, high-stakes world of senior executive engagement, losing the information advantage does not flatten the seller's value; it sharpens what remains, not what you know, but the judgment and trust with which you help a leader think.

What endures: The Trusted Advisor

There is one body of work that the parity era does not retire but rather vindicates.

If Pink named the condition, this is the work that had already answered it. More than two decades ago, David Maister, Charles Green, and Robert Galford gave our field its most durable idea in The Trusted Advisor, and the lineage it began, through Trust-Based Selling and The Trusted Advisor Fieldbook, moved the work from winning transactions to earning trust.

Where SPIN and Challenger located the seller's advantage in what the seller knew, The Trusted Advisor located it somewhere information could never reach: in the client's confidence that the advisor was genuinely and reliably on their side. Even the literature on AI in selling lands in the same place, a Harvard Business Review framework on artificial intelligence and sales places the most valuable relationships at the level of the "trusted co-creator," the point at which it is the relationship, not the information, that carries the value.

Their trust equation has lost none of its force. Trust, they argued, grows with an advisor's credibility, reliability, and intimacy, and diminishes as self-orientation climbs. What Information Parity changes is not the equation but the weight of its terms. When every advisor can appear credible on the facts, and AI now lets anyone marshal them, credibility alone ceases to distinguish. The decisive weight shifts to the parts of trust that no tool can manufacture: the intimacy of genuinely understanding this executive's particular situation, and the low self-orientation of an advisor whose attention is clearly on the client rather than on the close.

This is the foundation The Invited Advisor builds upon, and the name is a deliberate echo. To be trusted is the necessary condition; to be invited is what trust must now earn. In an era of scarce access, the executive's confidence that you are on their side expresses itself in one demanding form: the wish to see you again. The Invited Advisor takes Maister and Green's enduring insight and asks what it now requires of an advisor's preparation, conversation, and judgment when the executive arrives already knowing as much as the advisor does.

From a question of permission to a question of desire

For years, our defining test was: would you see them again? It measured permission, whether the seller had cleared the modest bar of not having wasted the executive's time. In a world where access to senior leaders was relatively abundant, that was a reasonable test. It is no longer sufficient.

Executive access has become genuinely scarce. Calendars are more defended, the opportunity cost of any meeting is higher, and the screening around senior leaders is stronger than ever. In that world, mere permission predicts almost nothing; an executive can find a meeting perfectly acceptable and still have no intention of repeating it.

So we have changed the question. The test that actually predicts a relationship is not whether the executive would see the advisor again, but whether they want to: not "was that acceptable," but "would you choose more of that?" Desire, not tolerance. It is a small change in wording and a complete change in what a meeting must accomplish, because almost everything about how an advisor prepares and conducts a conversation looks different once the goal is to be wanted rather than merely permitted.

> *Desire, not tolerance. A small change in wording, and a complete change in what a meeting must accomplish.*

The Invited Advisor™

If the scarce currency is the executive's wish to continue, then the purpose of a meeting is no longer to inform, to persuade, or to take control. It is to be someone a leader wants more of, to be invited. That is the approach we have developed, and the name we have given it: The Invited Advisor™.

The decisive test is what the executive feels and thinks after the meeting has ended. The advisor who gets invited back is, almost without exception, the one who left the executive thinking more clearly about their own situation than before the conversation began, who was additive to the executive's thinking rather than competing with the executive's information. The advisor no longer wins by knowing more. They win by the judgment with which they use what both parties already know, in service of the executive's agenda and at the executive's level.

Daniel Pink put it well: in a world of parity, the seller's job is no longer to supply information but to help curate and make sense of it. When a leader is awash in an explosion of data and AI-generated analysis, the scarce service an advisor can render is exactly that, turning abundance into clarity, and clarity into a decision the leader can act on with confidence.

This is borne out well beyond our own simulation rooms. Even as buyers turn to AI to research, a 2026 Gartner survey found that 69% still preferred to validate AI-generated insights with a person, and that buyers were markedly more likely to credit a human, rather than the AI, with understanding their needs and giving them the confidence to decide.

69% of B2B buyers still preferred to validate AI-generated insights with a person, not the AI.
Gartner, 2026

What it requires: mindset, preparation, and conversation

Reduced to its essentials, being invited back requires three things, and our framework is built to develop each of them.

01 A different mindset
advisor-first rather than seller-first, peer-to-peer rather than supplicant, anchored in genuine regard for the person across the table, and treating the pursuit of growth as a form of leadership rather than an act of selling.

02 A different preparation
arriving with a research- and AI-grounded hypothesis not only about what is on the executive's mind but about how they are likely to want to engage, so that generic discovery is replaced by an efficient, informed, executive-level starting point.

03 A different conversation
opening with insight that belongs in the executive's world, engaging leader-to-leader, reading and adapting to how each leader prefers to engage, and deepening trust across interactions rather than advancing a pitch.

These are not slogans; each is built on specific, tested practice, the essential orientation of The Leader's Mindset™, the disciplined preparation we call Mindset Mapping™, the structure of the Leader-to-Leader Conversation™, and the discernment and skills of heightened Interpersonal Intelligence™. These elements are described in more detail in our companion piece, The Invited Firm™.

One thread runs through all three

Running through each of these differences, mindset, preparation, and conversation, is something we have taught for years, and this paper would be remiss if it left implicit the skill of reading the person, not only the problem. Most advisors will recognize it: the empathy and listening, the calibration of pace and tone that make a leader feel genuinely met, and the common ground and values that make an exchange personal rather than generic.

This thread is not a fourth move to add after the others. It is the human texture of all three, the regard that makes a leader's mindset real, the attentiveness that turns preparation into genuine understanding, and the versatility that lets a leader-to-leader conversation land in the register each particular leader prefers. And it is important evidence that the advisor will work well with their team. We call the broader discipline Interpersonal Intelligence™ and treat it as a teachable skill rather than a fixed trait. In an era when everyone can sound credible on the facts, how an advisor makes a leader feel, understood and met on their own terms, often decides whether there will be a next conversation.

Why AI is the enabler, not only the disruptor

It would be easy to read all of this as a story about technology taking something away. It is at least as much a story about what technology now makes possible. The same tools that dissolved the old advantage also allow an advisor to arrive genuinely attuned, to understand a leader's pressures, priorities, and probable options ahead of the meeting, at a depth that was previously unattainable. And the human role is not receding as the tools spread: a 2025 Harvard Business Review analysis finds that as products and decisions grow more complex, demand for skilled, judgment-led salespeople is growing alongside AI rather than shrinking against it.

The differentiator has moved from the information itself to the judgment with which it is used. AI raises the floor for everyone, and that is exactly why what an advisor does with it becomes decisive: the human act of turning abundant research into a sharp, executive-level point of view that the executive immediately recognizes as relevant. Parity removes the old competitive edge. Attunement, well prepared, becomes the new one.

A developmental arc, not a method

Unlike approaches drawn from a single study at a single point in time, ours has been shaped, tested, and refined continuously over years of live simulations with C-level executives conducted globally, as well as through continuing conversations with a community of leaders worldwide. Meeting by meeting, we have watched which behaviors move an executive from "that was acceptable" to "I want more of this," and which, however polished, do not.

What has emerged is not a script. It is a developmental arc, from mindset and preparation to levels of discernment that sensitively craft and introduce the right combination of the firm's capabilities through informed, Leader-to-Leader Conversations™.

And to sustain these disciplines over time, different leadership practices are also needed. We look forward to sharing more of what best practices look like in today's emerging environment in our companion piece, The Invited Firm™.

> *The advisor no longer wins by knowing more. They win by the judgment with which they use what both parties already know.*

SGA Csuite.com EXECUTIVE ENGAGEMENT IN THE AGE OF INFORMATION PARITY

Sources

The observations in this paper come from SGA Inc.'s own research and simulation work over many years. The external findings below, drawn from public research, point in the same direction.

FOUNDATIONAL WORKS

Rackham, Neil. *SPIN Selling.* McGraw-Hill, 1988.

Maister, David H., Charles H. Green, and Robert M. Galford. *The Trusted Advisor.* Free Press, 2000.

Green, Charles H. *Trust-Based Selling.* McGraw-Hill, 2005.

Dixon, Matthew, and Brent Adamson. *The Challenger Sale: Taking Control of the Customer Conversation.* Portfolio / Penguin, 2011.

Green, Charles H., and Andrea P. Howe. *The Trusted Advisor Fieldbook: A Comprehensive Toolkit for Leading with Trust.* Wiley, 2011.

Pink, Daniel H. *To Sell Is Human: The Surprising Truth About Moving Others.* Riverhead Books, 2012.

RESEARCH CITED

Gartner, "Gartner Survey Finds 69% of B2B Buyers Turn to Sales Reps to Validate AI-Generated Insights" (May 2026). Survey of 645 B2B buyers, fielded August–September 2025; buyers were also substantially more likely to say a human seller, rather than generative AI, understood their needs and gave them the confidence to decide.

Gartner, "Gartner Sales Survey Finds 67% of B2B Buyers Prefer a Rep-Free Experience" (March 2026). Survey of 646 B2B buyers.

Gartner, "Gartner Sales Survey Finds 61% of B2B Buyers Prefer a Rep-Free Buying Experience" (June 2025). Survey of 632 B2B buyers; the earlier baseline for the trend above.

Prabhakant Sinha, Arun Shastri and Sally Lorimer, "How Generative AI Will Change Sales," Harvard Business Review (March 2023). AI absorbs much of the research and routine preparation of selling, freeing the seller for higher-value work.

Jim Dickie, Boris Groysberg, Benson Shapiro and Barry Trailer, "Can AI Really Help You Sell?" Harvard Business Review (November–December 2022). Its Sales Success Matrix runs from a transactional vendor relationship at one end to a trusted co-creator relationship at the other.

"Why Some Sales Teams Are Actually Growing Alongside AI," Harvard Business Review (September 2025). As products and decisions grow more complex, demand for skilled, judgment-led salespeople persists.

Gartner findings are drawn from the company's public press releases, which may be cited with attribution; the Harvard Business Review articles are cited by title and author. Full reproduction of any source listed here would require the publisher's permission.