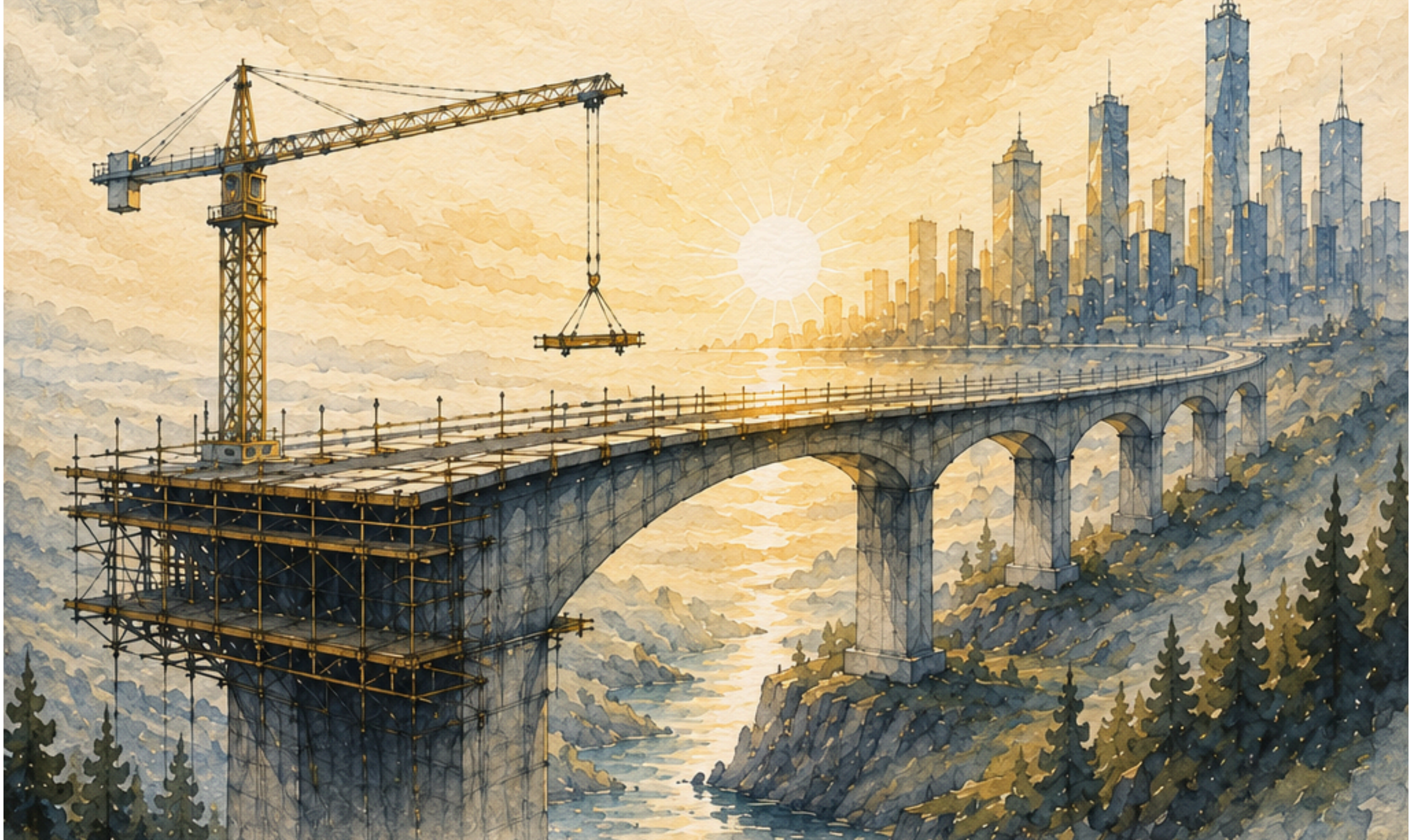
THE BUILDER MINDSET

Winning The War For Clients
In Professional Services



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Mitchell Schuckman

INTRODUCTION

In April 2026, I was on my typical early morning dog walk on my favorite beach, Quidnet Beach on Nantucket. It's the time of day when I do my very best thinking. It seems I do my best thinking with sand in my sneakers.

I had spent that week in coaching session after coaching session, hearing a version of the same worry from senior partners I've worked with for years. Work was still coming in. But something about how hard everyone was fighting to keep it coming in had changed. As I walked, dogs pulling toward the water, I realized I had been hearing that same undercurrent for almost two years, across dozens of conversations, and I had never stopped to write any of it down.

I had lived a version of this fight myself. I spent nearly four decades inside one of the world's largest professional services firms, most of it as an engagement partner and, later, the firm's global pursuit leader, supporting more than a thousand competitive proposals and pursuits along the way. I knew what an intense market felt like from the inside. And that April, I felt that intensity rising at a pace I hadn't seen before, even measured against my own career.

By the time I got back to the house and poured my second cup of coffee, I had already decided. I was going to write about what I was seeing. Article ideas and storylines were already racing through my head before I'd even taken off my sneakers. That week I started what became fifteen weekly articles for professional services executives who wanted to win more work. I published one a week, all summer, and called the series ***The Builder Mindset: Winning the War for Clients in Professional Services.***

The second walk that mattered came months later, after the series had wrapped. Same beach, same dogs, a different season. I was thinking back through everything I'd written that summer, and it hit me that the fifteen pieces weren't fifteen separate thoughts. They were one argument, told in fifteen parts, and it felt like the kind of case a busy executive would actually finish if it were sitting in their hands rather than scattered across fifteen emails. That's the book you're holding.

The fifteen chapters that follow are the articles I wrote that summer, in the order I wrote them, expanded and sharpened for this book. Each one starts with a real situation, drawn from a coaching engagement or a proposal I coached a team through. Names and identifying details throughout have been changed, and most of the people you'll meet are composites built from patterns I've seen across many clients over many years. They don't represent any single individual.

If you've ever felt uncomfortable calling business development "selling," wondered how to keep an important client relationship from going stagnant, or sensed that what got you here may not be enough to get you where you want to go next, this book is for you.

The war for talent hasn't ended. But the war for clients has already started. This is what I've learned about how to win it.

CHAPTER ONE

We Fought the War for Talent. Now We're Fighting the War for Clients.

> *The market for professional services is more competitive than ever.*

A few weeks ago I was coaching a senior partner at a global consulting firm, one of those calls where you can hear in their voice that they didn't sleep well the night before. He'd been in the business for over twenty-five years, a genuine high performer with deep subject-matter expertise and the kind of resume most people in his industry wished they had. But something wasn't sitting right with him.

"Work is still coming in," he told me. "But my firm and our competitors are competing harder than ever for clients. I'm not sure what's driving it, but it's almost like a fight for survival. Sometimes we make such extreme commitments to win an engagement that I wonder whether we should want to win. Then I realize that if we don't win, we won't survive. I'm definitely not sure what to do about it."

I'd heard versions of that conversation constantly over the past two years, in coaching sessions and executive conversations almost every week.

A New Front Has Opened

For a generation, the dominant battle in professional services was the war for talent. Attract strong people, deliver excellent work, deepen institutional relationships, and growth followed.

That war hasn't ended. But a second front has opened, and it is already reshaping how professional services firms grow: the war for clients.

AI is the accelerant. Clients are watching what AI can do, whether inside their own organizations or inside the firms advising them, and they're asking harder questions about what a service is actually worth and what a fair price looks like. That doesn't eliminate the need for experts. It raises what those experts need to bring to the relationship.

Layer on geopolitics, new regulations, supply chain shifts, and financial volatility, and the ground underneath every firm is moving. The professionals who come out ahead are the ones who notice client pressure early, frame it clearly, and earn trust before there is a formal RFP.

I refer to professionals who excel at identifying and creating value for clients as ***builders***.

What a Builder Actually Does

A builder is a professional who does three things most technically excellent people were never taught. They recognize emerging client pressure before it becomes a formal buying need. They translate expertise into relevance in language a client decision-maker can act on. And they earn trust on a timeline that precedes the buying conversation.

Most professionals were promoted because they earned deep trust through technical mastery. What the next stage requires is something different: a set of habits most firms never taught. This book is about closing that gap.

In professional services, the professional isn't the whole product, but they are the part the client ultimately has to trust. Methodology, technology, and team all matter. But it is the person accountable to the client, sitting across from them when the stakes are high, who carries the most weight.

AI has put more weight on that person, not less. When the analysis, the drafting, and the research can all be produced quickly, the client's real question becomes who is standing behind the work. That question used to be answered by a firm's name on the letterhead. Increasingly, it is answered by the individual who is actually doing the work.

What I've Learned

That instinct comes from the four decades I described earlier, watching this pattern play out across more than a thousand competitive proposals.

Here is the pattern I keep seeing. Firms usually explain losses in terms of price, credentials, or technology capabilities. Sometimes those are the real stories. More often, beneath the stated reason, there is a deeper one. The client never got a clear sense of what it would be like to work with this team, or how this team would help make them successful. Business development, done well, is the discipline of making that connection early, before anyone has asked for a proposal.

The past two years have sharpened my view of that. I've coached an engineering firm founder in California on how to tell a compelling story to prospective clients, a consulting principal in Asia on how to stop leading with credentials and start creating shared insight, and a business development director at a European law firm on helping their lawyers compete in markets that were never this competitive. In every case, the issue was not lack of expertise. It was that expertise was not being translated into something the client could relate to and act on.

I hold a Professional Certified Coach credential from the International Coaching Federation and am trained at the Hudson Institute of Coaching. That combination of extensive business development experience and a coaching mindset shapes how I see this problem, and how I help people solve it.

What Follows

The chapters ahead move from the shift itself to the specific habits that separate a builder from everyone else. They cover what happens in a first client meeting, what happens after you win the work, and what it takes to keep winning it year after year.

Most professionals I work with dislike the word "selling," they worry about client relationships that have gotten complacent, and they wonder whether what made them successful will keep working. If any of that sounds familiar, this is for you. Partners, future partners, firm leaders, and business development professionals all face the same problem because the need to win more clients and grow a business touches all of them.

The war for talent shaped how our firms hired for thirty years. The war for clients will shape how they grow for the next thirty. This book is about learning to fight it well.

CHAPTER TWO

A Nice Meeting Is Not a Relationship

> *A relationship that feels strong from the inside can be fragile from the outside.*

I was brought in to help a midsize professional services firm prepare for a competitive proposal. Unlike many proposal teams I coach, where there are too many cooks in the kitchen and too many opinions being tossed around, this one was particularly calm. The firm had been providing ongoing work for this client for several years. Solid work. No complaints. When I asked the partners how they felt, they weren't worried at all. One of them told me, almost reassuringly, that the relationship was strong. The client always shared laughs at the annual Christmas lunch. Always responded quickly to emails, even texts. Always sincerely thanked the team at the end of every quarterly review.

The firm lost.

What the Debrief Actually Said

I was asked to conduct the debrief. Over the years I have done hundreds of debriefs, after losses and after wins. This debrief was overly polite, which is usually how I know it isn't complete. The official explanation was that the winning firm had presented a compelling approach and competitive pricing. Both were true. Neither was the real story.

The real story came out over the following weeks, in fragments. The winning firm had spent three years getting to know that client. Not through dinners or event tickets. Through time, patience, and consistency. They had helped the client think through a strategic problem at no charge. They had sent specific, relevant, and customized insight pieces without being asked. They had met with people two levels below the decision-maker, learned what success actually looked like inside that organization, and made themselves useful long before there was anything to bid on.

The incumbent team had no idea any of this was happening.

The Difference Between Cordial and Committed

There is a version of a client relationship that feels strong from the inside and is fragile from the outside. Meetings go well. Emails get returned. The client seems happy. What is missing is the kind of relationship where the client genuinely wants you to succeed, where they will tell you, within whatever the process allows, what it will actually take to win. They have your back.

That kind of relationship is built differently. It is built through curiosity about what the client is actually trying to accomplish, not just what they have hired you to do. It is built through consistent, small investments of time and thinking that have no immediate payoff. It is built through relationships with multiple people at multiple levels in the client organization, not just the one who signs the engagement letter. And it is built over years, not weeks.

The incumbent firm knew a handful of people through working together. The winning firm had built several relationships with care. And they had been building them quietly, while the incumbent was completing the tasks they were hired for, and having Christmas lunches.

Where Trust Actually Gets Built

I think about this the way I think about a marriage that survives a hard year. The couples who make it are rarely the ones who never had a difficult conversation. They are the ones who kept having small, honest conversations all along, so that when a hard year came, there was already a foundation underneath it. A client relationship works the same way. The firms that survive a competitive process are the ones who were already having the honest conversations, long before the process began.

Most firms treat the annual review meeting as the relationship. It isn't. It is a checkpoint. The relationship is everything that happens in between those meetings, the small unscheduled acts where a firm chooses to invest without being asked.

What Your Strongest Competitors Are Doing

I work with pursuit teams across professional services, and one pattern I see consistently is this: the team that feels safe is often the team most at risk. Feeling safe produces a different kind of business development behavior than feeling competitive. Client relationships are like our personal relationships. They take care, they take work, and they require understanding the other person more deeply today than you did the day before.

The competitors you are not thinking about are thinking about your clients. They are having conversations, offering perspectives, and building familiarity. They know what your client wishes they had, because they regularly ask. By the time an RFP arrives, they have already answered the most important questions the client has. What would it actually be like to work with these people? And how will next year be even better than this year?

If you haven't answered those questions with your client and you're responding to an RFP, you're too late.

The Question Worth Asking Now

Before the next procurement process touches your most important client relationships, it is worth asking something directly. If this work went out to bid tomorrow, do I know, specifically, who in that organization would go to bat for us, and why?

Not who likes us. Not who returns our calls. Who actually wants us to win, and what have we done to deserve that?

A nice meeting is not a relationship. A relationship is what someone does for you when the stakes are high.

CHAPTER THREE

Growing Your Network Every Day

> *A network that isn't growing is already losing value.*

When I was coming up in my career, a senior partner I respected gave me three words of advice about business development. "Always be networking," he said. "It's as easy as ABC." I smiled, nodded, and went back to my desk thinking it was the least useful thing anyone had ever told me.

He hadn't told me how to do it, why I should do it, or what he meant by ABC. Reflecting back, I recall certain moments that helped me understand what he meant.

Several years after I received that advice about networking, I was standing on the sideline at one of my sons' youth soccer games, talking to another parent. Our kids were playing poorly, and the weather was cold and damp. Frankly, I was glad to have something to distract me. I asked him how his workweek had gone. Turns out, he ran a midsize logistics company. I was well into my career at a large global professional services firm. There was no obvious connection between what he did and what I did.

He mentioned that a client of his was expanding into Europe and running into complications around workforce compliance. We talked for twenty minutes, I explained what I knew about the subject, and he asked if I would be willing to speak with his client. That conversation led to an engagement. A year later he introduced me to a CFO he knew well, someone I never would have reached through my own connections, and that relationship produced work for the next three years.

I wasn't working on my network. I was just curious about the person standing next to me.

The A in ABC

That, I eventually realized, is what ABC actually means. Always Be Curious. Being curious in a conversation is networking, and growing your network will eventually lead to growing your business.

The distinction matters more than it sounds. Working a network is transactional. You show up looking for something, and people can feel it. Being curious is not transactional at all. You show up interested in the other person, with no particular outcome in mind, and the business development happens as a byproduct, not as the goal.

The Network That Slowly Stops Working

Most professionals I coach have a network that was built during specific windows of their career. The clients from ten years ago. The colleagues from a firm they left. The contacts from an industry conference they stopped attending. Those relationships are worth maintaining. But a network that isn't growing is one that is slowly losing its value.

The signs are subtle. The referrals that used to come in steadily start to thin. The introductions slow down. The professional can't explain it because they still feel well-connected.

Part of what's happening is natural. People move on, change industries, retire, or drift from the position where they could be helpful. An A-list contact from five years ago can quietly become a C-list one without either of you noticing. Every network has attrition. The professionals who keep their pipeline healthy treat adding to their network as a discipline, not an event.

Where Builders Look That Others Don't

The professionals I have worked with who develop business most consistently share something that has nothing to do with how many events they attend or how active they are on LinkedIn. They are curious about people, all kinds of people, and they stay in motion across a wide range of relationships.

The former colleague who moved to a different industry. The college friend who became a CFO at a company you've never heard of. The neighbor who just took a new role. The parent at the school event whose company is growing faster than she expected. None of these feel like business development. That is exactly what makes them worth pursuing.

The conversations are authentic. The interest and curiosity are sincere. And conversations approached with interest and curiosity expand networks.

What Staying in Touch Actually Looks Like

The builders I have coached don't only stay in touch by scheduling formal check-in calls. They stay in touch the way good friends do. A text when something relevant comes up. A message with an article that made them think of someone. A birthday note that doesn't ask for anything. A short follow-up on a challenge someone mentioned six months earlier. Small gestures, sent without expectation, that quietly tell the other person they are still on your mind.

Those investments are small individually. Collectively they produce something hard to replicate: a reputation, across a wide range of people and industries, for being useful, caring, and interested.

That reputation travels ahead of you. It arrives in a room before you do, in the form of someone saying, you should talk to this person, long before you ever asked to be introduced.

Five Minutes a Day

Think about someone you haven't connected with recently who matters to you. Keep a running list if that helps, a simple spreadsheet or notes app, anything that keeps names in front of you.

Reach out with something specific. Something you read that reminded you of them. A question about something they were working on. Not a networking note. A human one.

Five purposeful minutes a day. A message sent, an introduction made, a thread picked back up. That discipline, practiced consistently, is what separates a network that grows from one that quietly fades.

Always be curious. The rest follows.

CHAPTER FOUR

Stop Asking What Keeps Them Up at Night

> *The question you ask decides whether the answer is honest.*

A senior partner, let's call her Samantha, opened her client meeting the way she always did, iPad open, stylus ready to write. She leaned in, made eye contact, and asked: what keeps you up at night?

The client answered. New SEC disclosure requirements were creating reporting headaches across his division, the team was stretched thin, and the timeline was short.

Samantha nodded, wrote it down, and spent the next twenty minutes presenting her firm's capabilities around the new requirements. Everyone left happy.

Three months later the client put the work out to bid. Samantha found herself one of six firms responding to an RFP on a project she thought she already owned.

The Answer You Get Is the One the Client Rehearsed

I debriefed with Samantha afterward, and she was sure the meeting had gone well. On the surface it had. The client was engaged, the presentation was relevant, the follow-up was prompt.

What she missed was that the client's answer was factual, but it was not personal. When you walk in and ask what keeps someone up at night, you are signaling that you have come hunting for a problem to sell against. So the client hands you the safe, defensible version of his concern and keeps the real one in his pocket.

And there was a real one. His CFO was pushing hard, had no patience for surprises, and wanted everything concise and never late. Worse, the disclosure work would expose a gap in how his division tracked certain data, and he was afraid it would surface before he had a chance to fix it. He did not need a firm that could manage a reporting timeline. He needed one that could help him get out in front of a problem his own leadership did not know about yet.

None of that came up. Samantha heard a basic answer and moved to her deck.

The People Who Do This Well Walk In Already Knowing Something

I will admit that when someone asks me what keeps me up at night, the honest answer is spicy food and bad dreams. Neither has ever started a useful business conversation.

The partners I have admired most over the years never opened with that question, or any question like it. They did not ask the client to do their homework for them. They had already done it themselves. They came in with one specific observation about that client's situation, offered it early, and asked whether it connected to anything the client was actually wrestling with.

Sometimes it lands and sometimes it doesn't. Whether or not it lands isn't the most important thing. When it lands, the client opens up in a way no direct question ever produces, because the observation proves you saw him before you walked in the door. When it does not land, you simply ask where his attention really is, and you follow that instead.

I used to think the point was to show the client what you knew. It is not. The point is to earn the right to hear what he has not yet said out loud.

The Conversation Most People End Too Soon

Once the door is open, the instinct is to rush toward your solution, and I have made that mistake myself more times than I would like to count.

What I learned to do instead was stay in the question a little longer. If you had a magic wand, what would you wish for here? What would you want to be able to tell your own leadership six months from now? What would have to be true for this to feel like a great year?

Those questions ask a client to think rather than recite, and they produce something a faster conversation never reaches. You get an honest picture of what success means to this particular person, under this particular pressure, at this point in his career. That is what the relationship, and a valuable solution, are built on.

What One Observation Was Worth

When the RFP came in, Samantha called me, and we pivoted her strategy. Rather than jumping into a proposal document that led with her firm's qualifications and project plans, Samantha asked the client for a short conversation. She started by sharing an observation. Disclosure processes like this one often expose gaps in how data gets tracked, and she wanted to know whether the client was navigating that.

The client talked for forty minutes. We wrote a proposal that centered on what he was actually worried about. Samantha won the work.

Afterward, the client told her she had been the only one who asked the right question. That for the first time, he felt someone had actually seen him, and understood what he was up against.

That is the whole thing. Clients do not open up because the question was clever. They open up because you proved you did the work before you arrived.

What keeps you up at night gets you a rehearsed answer. Proving you saw them gets you the truth.

CHAPTER FIVE

They Didn't Buy the Work. They Bet on Themselves.

> *The comfortable explanation for a loss is rarely the accurate one.*

I have conducted my share of post-loss debriefs with clients. When I review what I heard with the losing team, half the team has already decided who or what to blame before I've said a word. Then someone says it. "They bought the work." Or: "They're going to lose money at that price." Or: "They made promises they can't keep."

I stopped nodding along a long time ago. When I was an engagement partner, I bet on myself constantly. I encourage the teams I coach to do the same. They often don't. And when they don't, they often lose. Not because those things are never true. Sometimes a competitor underprices and overpromises. But I have seen enough situations play out to know that the comfortable explanation is rarely the accurate one.

What Is Actually Happening Out There

AI is doing something to many professional services offerings, though not all, that the industry has not fully reckoned with yet. It is compressing the time it takes to do certain kinds of work. It is reducing the headcount required to deliver. It is changing what a reasonable price looks like for a client who is paying attention, and more of them are paying attention than ever before.

Research that used to take a junior analyst two days now takes an hour. Financial statements, regulatory applications, and other filings that required several sets of eyes are being reviewed in minutes. Document review, contract analysis, first-draft memo writing, financial reconciliations, regulatory summaries: the tools available to any professional willing to use them are getting faster and more capable almost every week. I think about this every time I consider whether I need to bring on support staff for my own small coaching and consulting business, and then a new AI tool releases a feature that does the job for me instead.

The firms winning right now understand this. They are pricing for where their delivery model is going, not where it is today. They are building in efficiencies that are still being constructed, quoting a number that reflects technology they are still deploying, and telling a story about what the engagement will look like that is ambitious by design.

That is not a lie. That is a bet.

The Bet the Losing Firms Won't Make

The firms writing the post-loss analysis are usually doing one of two things. They are either not seeing the shift at all, still pricing based on delivery models and anticipated hours that do not begin to account for where AI is taking the work, or they are seeing it and deciding it is too risky to propose on that basis.

A firm that refuses to price for the future because the future is not fully built yet is not being careful. It is being outrun. The competitor who won that engagement is not planning to give up and lose money. They are planning to close the gap between the promise and the delivery quickly, and they are betting on their own ability to do it.

What Builders Understand About Confidence

I did this long before AI existed. When I was a client service partner, I would go to my leaders and ask them to let me bet on myself and my team. The pitch was simple: let me transition the client, win them over through relationships and sincere care for their success, learn their business well enough to get efficient, and push my team to do the same. It might take a year or two to get the margin right, but I knew I could figure it out. My leaders said yes, mostly because of my track record and the confidence I brought to the conversation. I almost always delivered.

The builders I coach today have the same instinct. They think hard about where their practice is heading, what technology is going to do to their delivery model, and what a fair price looks like for a client who understands the market. They tell a story that is specific enough to be credible and confident enough to be memorable. And they win.

Then they deliver. That part matters as much as anything. A builder who makes a bold promise and then walks away from the urgency of honoring it has not built anything. The confidence has to run all the way through, into the delivery, into the relationship, into every conversation with their client.

The Question Worth Sitting With

The next time your firm loses a piece of work and someone in the room says the winner bought it, push back. Ask what story the winning firm told. Ask what their price reflected about how they saw the future of delivery. Ask whether your firm was willing to have that conversation, or whether you held back because the future wasn't certain enough yet.

The future is never certain enough. Builders compete anyway.

That's how the work moves to other firms. Not because they lied. Because they were willing to bet on themselves, and you weren't sure you could do the same.

CHAPTER SIX

Comedians End With the Punchline. A Business Meeting Shouldn't Be a Comedy Show.

> *By the time the punchline arrives, half the room has already decided.*

I recently sat in on an orals rehearsal for a pursuit team going after a recurring legal managed service engagement, the kind of engagement that runs for years once a client signs on. The incumbent had held this work for a while, and the client wanted to understand exactly how disruptive a change would be. The engagement leader sat back and looked overconfident. He knew that Jonathan, the PMO lead, had run dozens of smooth transitions and could describe them in tremendous detail, with confidence.

Jonathan stood up to walk us through the transition plan. Step one. Step two. Step three. Each step had its own slide, its own bullet points, its own careful explanation of what would happen and when.

By step three, I noticed I had stopped listening to the content and started watching the room instead. People were checking phones, glancing at each other, doing quiet math on how many steps were left.

The Plan Wasn't the Problem

What struck me wasn't that the plan was wrong. It was good, probably the most detailed and well-prepared piece of the whole proposal. What struck me was that we had buried the one sentence this client needed first under four slides describing steps they didn't need to hear yet.

Start With the Punchline

I pulled Jonathan aside during the break and asked if I could rework his opening with him. Here's what I coached him to say instead. Something like, when I lead your transition, this is what you'll experience. Almost no disruption, almost no time from your team, and within sixty days you will know more about this engagement than you do today. I'm going to walk you through the five steps that get you there, and I'm happy to go as deep into any one of them as you would like.

That's a powerful opening statement, the way a lawyer tells the jury what they're about to prove before they start proving it. Comedians get to build toward a punchline because the audience came to wait for it. Clients don't come to a meeting wanting to wait for someone to tell them why this is valuable to them. By the time the punchline arrives, half the room has already decided what they think, and the other half stopped listening.

Effort Is Not the Pitch

I understand the instinct, because I've had it myself more times than I would like to admit. Walking through every step in order feels like proof. It says, we thought about this carefully, we did the work, we are not winging it.

But the client is not grading your homework. They are deciding whether to engage you for a project that matters to their business, and what they want to know first is what hiring you will get them. The steps still matter. They are just not the headline.

Know When You've Already Won the Room

There is a flip side to this, and I have watched plenty of people get it wrong in the other direction. They lead with the right answer, the room nods, and then they keep going anyway, walking through analysis nobody asked for. Why? Because they prepared a deck with twenty slides and haven't gone through them all yet.

Senior executives will tell you when they're with you. A nod, a "got it, what's next," a shift in posture. That is not an invitation to keep building the case. It is a signal that the case is closed, and the better move is to ask what they want to go deeper on, not march through the rest of the script.

I sat through one like that not long ago. The partner opened well, said exactly the right thing in the first ninety seconds, and the client lit up. Then the partner smiled back and said, “I'm prepared to describe how we get you this result at a high level, and I'll go as deep as you want in order for you to feel comfortable that my team and I will deliver. Please stop me whenever you want to. My goal is to make you comfortable, not to walk you through an entire project plan, unless that's what you want me to do”.

That was a winning move.

Write the Sentence First

Before your next presentation, write down the one sentence you want the room to remember if they remember nothing else. Put it first. Then build everything else as backup, ready if asked for, not required reading.

If you cannot get that sentence down to one line, you don't have it yet. That is not a writing problem. It is a sign you have not decided what this is about.

Jonathan stood up and ran it again. Same five steps, same slides, same order underneath. He just moved one sentence from the end to the beginning. The room felt different before he finished his second sentence.

Doing What's Expected Is Not a Relationship Strategy

> *Doing the work is the price of staying. It is rarely the reason a client keeps you.*

I had lunch a few months ago with the indirect tax practice leader at a large tax firm. Let's call him Dave. We were huddling in a New York deli, over sandwiches that were way too big, and way too expensive. Partway through the meal he started telling me about a proposal one of his teams had lost a few months earlier, an international retail client they had served for five years.

The Work That Always Got Done

A generally strong team in Dave's practice, led by a partner we'll call Alex, handled recurring indirect tax compliance for a well-known retailer that had expanded quickly, with stores across a dozen states and several countries in Europe. They also had an online storefront. This client's operations created state sales tax and VAT obligations across the United States and Europe. The work never stopped. There were constant tax deadlines to meet.

Regular quarterly and annual review meetings happened on schedule. In those meetings, Alex's team typically walked through status reports, what had been filed, what was outstanding, and any notices received from state and overseas tax authorities. Sometimes they added a summary of relevant tax law changes across jurisdictions. Nobody ever asked the indirect tax leader at the client, Joann, what she needed to be successful in front of her internal stakeholders. Nobody showed her what AI tools were making possible in terms of efficiency and insight. Nobody checked whether fees still made sense given what technology had changed about how this work gets done and what the market now charges for it.

None of what was shared with Joann was wrong. It is just that most of it could have been generated by a good AI tool in minutes, reviewed for accuracy, and shared with the client without a meeting. Alex never thought much about it. To Alex, steady delivery and regular status meetings were the foundation of his client relationship.

Where the Client's Attention Actually Was

While Alex's team managed the day-to-day, Joann was doing something else. She was going to conferences. She was taking calls from other firms. She was seeing and hearing what best-in-class service could look like, which turned out to be considerably more than a status report and periodic tax law updates.

When an RFP arrived from the client's procurement department, Alex's team spent two days debating how to handle a handful of recent late filings. Should they proactively address them in their proposal, or stay quiet and let their relationship carry the weight?

That was the wrong debate entirely. The late filings were the least of it. The real issue was five years of tax filings and review meetings that never once asked the client what she needed to succeed personally in her role, never focused on the company's business strategy, never demonstrated anything that pushed beyond the scope of services the team was engaged to perform. Joann's eyes had moved to the art of the possible. Alex's team was still looking at their to-do list.

What Came Out Over Hamburgers

Dave did not find any of this out until weeks after the loss. A mutual friend, who neither of them knew was mutual until that afternoon, had invited Dave and the client's CFO to the same backyard barbecue.

They got to talking, and somewhere between cold iced tea and freshly grilled hamburgers the CFO mentioned almost in passing why their company had switched providers. Good governance required a competitive process, so one happened. But finding a new service provider had been on the tax department's agenda well before the RFP ever went out.

The winning firm had asked what international expansion meant for the business's global growth strategy. They showed Joann and her team where many global tax authorities were heading in terms of compliance monitoring, and how AI-driven technology could help them get ahead of any challenges. They reviewed their fees against what the market was charging and where the future of service delivery was heading for comparable work. Then they came in with meaningfully lower fees.

Nobody on Alex's team had done any of that. They had been too busy filing tax returns.

Look Honestly at Your Accounts

If you run recurring work for a client, ask yourself: when you last had a conversation that had nothing to do with status? When did you last show them something new? When did you last ask what the individual client needs to succeed in their own role? When did you last check whether your fees still made sense given what technology has changed about how the work gets done?

The filing, the reporting, the showing up on time are the basic requirements of staying in the relationship. It is rarely going to be the reason a client chooses to keep you.

Alex's team did not fail. They just never did anything beyond the work itself, and it took a backyard barbecue to find out that just doing the work was not enough.

CHAPTER EIGHT

The Other Firm Was Still Checking Its Math

> *The relationship gets you the invitation. The story gets you the win.*

Two accounting firms got an invitation to bid on the same engagement last year, a family business that had finally outgrown its founder's brother-in-law, who had run the books out of a home office for fifteen years. The business had grown past what one person could manage. It needed bookkeeping, tax planning, and financial statement preparation. The kind of support a company brings on once it stops being a kitchen table operation.

Both firms had some history with the owner. They had crossed paths at industry events, sat on the same nonprofit board, exchanged a few calls over the years. That history was enough to get both firms onto the short list. It was not enough to decide who would win the work, though one of the two firms believed otherwise.

Where One Firm Spent Its Hours

The first firm treated the invitation as a sign they were already ahead. As they prepared for their proposal meeting with the founder and his financial controller, they spent most of their time on pricing: confirming scope, anticipating staffing requirements, running profit models, version after version of the same spreadsheet checked against the firm's own profit expectations and benchmarks.

That instinct is not unique to this team. Most people who succeed in professional services are trained to be analytical. Focusing on pricing and anticipated financial results feels to most professionals like the one variable they can control. Numbers are safe. Relationships, when there is a positive history, feel safe too.

Underneath the analysis sat a quiet assumption. They know us. We have history. We are highly credentialed and know how to do this work. All of that should carry the day. Nobody on the team had a clear sense of what the owner actually needed from a firm he was about to trust with the next stage of his business.

Where the Other Firm Spent Its Hours

The second firm built a price that was competitive, priced to win, and fair to both sides. That conversation took far less time than it took the first firm. They also had confidence in their industry experience, but they knew almost any firm on that short list could say the same thing. Industry experience was the entry fee, not the differentiator.

So they spent their hours somewhere else. They read everything publicly available about the business, mapped the owner's distribution footprint, and came in with a working hypothesis about where his growth was creating complexity he might not yet be tracking, including payroll tax and multi-state sales tax obligations. They also had a point of view on the gap between what his books currently showed and what they would need to show to support the decisions he was likely to face in the next few years.

But the most important part was not the research. It was how they planned to describe what the relationship would look like in practice. They would want to sit in on operations meetings, not just finance reviews. They would want to understand what the warehouse manager was seeing in inventory, what his sales team was chasing in new markets, what staffing decisions were being considered over the next twelve months. Not because accountants needed to weigh in on all of it, but because investing that time and gaining that context would turn accurate tax and accounting work into useful business advice. They practiced their story and they rehearsed as a team.

When they met with the client, the owner leaned forward. They won the work.

The Only Lever Left

Look honestly at where your team's preparation hours go during your next proposal. If most of them landed on the pricing model, or on reassuring each other about the relationship, or on the firm's industry credentials, you have learned something true about where your team feels safe. Being safe is not the same as winning.

The relationship gets you the invitation. Price keeps you in the conversation. Capabilities get you to the short list. By the time the proposal lands, all three are fixed. A team that spends its hours there is managing the cost of entry, not the outcome.

One thing is not fixed: the story. The research, the specific insight, the case built for this client and no one else. That is what gets a client to lean forward. Spend your hours there, while the other firm is still checking its math.

CHAPTER NINE

The Pursuit Function Nobody Has Built Yet

> *AI solved the throughput problem. It didn't answer what the job is for.*

Denise, a Chief Commercial Officer at a global consulting firm, sat down last fall with twelve proposals her firm had submitted over the prior six months, a legal pad and a venti Starbucks latte next to her laptop. She read the executive summaries back to back. By the fourth one, her eyes had started to glaze over, and she caught herself rereading the same paragraph twice.

Same opening move. Same value language. Same promise to be a trusted partner who understood the client's business. Professionally produced. Not one of them would have made an impactful impression.

Built for a Different Problem

Most firms built their proposal teams to solve a volume problem. Partners pursuing work across multiple services and industries needed consistency, templates, a credentials library, a team that turned documents around quickly. The goal was throughput, not differentiation.

AI has solved the throughput problem. Used well, it generates first drafts in minutes, profiles clients in detail, maps the competition, and assembles supporting materials without a human touching it.

Which surfaces the real question. If AI handles all of that, what is the pursuit team's actual job?

The Journalist at the World Cup

A journalist covering the FIFA World Cup does not need to know how to score a goal like a top striker, but they need to know who that striker is. They need to understand what a particular match means in the context of a team's journey, what a goalkeeper is thinking seconds before facing a penalty kick, and what their readers need to feel to stay riveted to the story rather than just the score.

A journalist who only knows how to write, but not what they are writing about or who they are writing for, produces content that informs without landing.

Many pursuit professionals made the same mistake. They believed their job was to take content from subject matter experts and shape it into a polished document. That's production work. AI does it now, and it does it faster.

What the function actually requires is someone who understands both sides of the table well enough to decide what the story is before a single word gets written.

What One CCO Recognized

After reading those uninspiring proposals, Denise ran the numbers on her firm's proposals. She analyzed volume, win rate, document quality, and the cost of her pursuit team.

She then set out to restructure the firm's proposal and pursuit function by building a smaller, more agile team. She hired a fractional pursuit leader who had spent years on both sides of the table. He brought two strong collaborators with him, and they had AI handle the research, competitive mapping, document production, and editorial polish.

What her new pursuit leader brought was something her current pursuit team never had. A point of view. Before any proposal was written he developed a strategic vision for how the firm should be positioned against this competitive field, for this buyer, right now. He profiled the client's decision makers. What mattered to them professionally. What they needed to show their own leadership. Where they were likely skeptical, and what it would take to move them.

From that foundation he built a creative narrative, with a specific point of view about the client's challenge and a clear argument for why their firm was the right choice. Every section of the proposal reinforced that argument. Nothing was boilerplate. Everything was written with purpose.

The first proposal under the new model targeted a financial services company looking for a strategic post-deal integration consultant. They won the work. Then they won the next two competitive proposals they entered.

A year later Denise is thrilled. Her firm's win rate has climbed significantly. A team of three part-timers is doing what ten full-timers used to do. The storyline frameworks and AI process guides they built are now in the hands of professionals across the firm, who handle standard proposals themselves. The most important proposals are left to the team that builds them best.

The Function Nobody Has Built Yet

One person who understands the game. Two strong collaborators. AI running everything else. A part-time pursuit team that outperforms what most firms are running at a fraction of the cost.

There is another dimension that raises the stakes further. AI is flooding professional services markets with capacity, and price is compressing as a result. In many professional services proposals, price does not win the engagement, but it can lose it. What separates the winner, after competitive pricing, is the story. As the cost of producing a proposal drops, a pursuit team that brings strategic thinking becomes worth more.

The firms that build this pursuit function first will win more work. They will keep raising the bar on what a proposal can be, while everyone else is still waiting for the next template.

CHAPTER TEN

Use Your Leaders More, and Use Them Well

> *A senior leader who shows up with impact can change a meeting before anyone speaks.*

I was coaching a pursuit team on a piece of business large enough that every serious competitor in the market wanted it. It was a name-brand client, the kind of logo that gets mentioned across a firm for years. Every member of the team desperately wanted to win. They were also petrified of losing. When I raised the idea of bringing in their CEO early, in the first pursuit planning session, nobody on the team had thought it was needed. I had assumed that using your top leaders strategically to win work was obvious. The team did not.

He's too busy, they said. It's overkill at this early stage. They could handle the opportunity themselves.

I have heard that instinct often, and it rarely comes from confidence. Bringing in the leader means someone at the top sees exactly where the pursuit stands, what is weak, what is soft, what nobody has answered yet. The team was not worried about the client. They were worried about their own boss's boss looking too closely and not liking what he saw.

Keeping Someone Out Rarely Looks Like Keeping Them Out

What finally moved them was not a pep talk. I told them plainly that their strongest competitors almost certainly had senior leaders already on the phone with this client, making commitments of their own. That got their attention. But the way they brought their CEO in was still limited. They gave him a few lines to cover in the pitch presentation. "This opportunity matters to us. We have put our best people on it. I stand behind this team."

In this case, the CEO sat through the entire pitch, but he participated passively, said his lines when his turn came, and otherwise let the team carry it. The client nodded politely and the meeting continued exactly as it would have without having the CEO in the room.

Nothing about that meeting was bad. It was just suboptimal. A leader who delivers a few safe lines does not change the game. In high-stakes pursuits, game-changing moves win work.

A CEO I Coached Directly

Not long after, I worked a different pursuit for a different client, one where I had a personal relationship with the CEO himself. When I was asked to coach a team at the company on a major proposal, I went directly to the CEO and asked him to get involved, not just in the pitch meeting, but with the senior leaders who could influence the decision from outside the room.

He called his counterpart at the client ahead of the orals, one CEO to another, to set the tone before anyone from either side sat down at a table. At the orals, he said the work mattered enough to him personally that he had already discussed it with his own board. He highlighted specific people on the team, and said he would remove any barrier that got in the way of the client getting the best his firm had. He said if fees ever felt wrong, he wanted to hear it directly, because he could authorize a change himself, on the spot. He did not ask for a seat at next year's review meeting. He gave the client's engagement leader his cell phone number, not to get anyone in trouble, but so whatever needed to happen could happen without delay. After the orals, he called his peer again, not to check on the decision, but to repeat what he had committed to and keep the door open.

In the pitch, the room went quiet. Then the whole dynamic changed.

Firm Size Might Change the Approach, Not the Principle

A senior leader from a large firm often enters a room with his firm's broader reach already in play. A board member who golfs with a senior partner. A successfully completed project for another division getting rave reviews. A common alliance with a technology provider creating shared advantages. That reach is real, and a sharp leader treats it as one more angle worth considering. He decides what matters right then and uses it well.

A leader from a smaller firm does not have that web of connections to draw on. What he can offer is himself. His commitment does not run through anyone else's relationship. It is direct, immediate, and impactful. A large firm leader's value often comes from what he can connect. A smaller firm leader's value comes from what he is willing to do himself, right now, without anyone standing between him and the client.

Different firms walk into that room from different starting points, and the right move probably looks different depending on the situation. But the principle underneath does not change. A senior leader who shows up and makes an impact fitted to the situation wins work.

The Choice Is Rarely Between In and Out

Most pursuit teams do not set out to keep their leadership on the sidelines. What actually happens is smaller than that. A seat at the table instead of a strategic role. A script instead of a mandate. A handshake at the door instead of hands-on leadership. It looks like courtesy. It costs you the fight.

A senior leader, used well, is the strongest lever a pursuit team has. Most teams never pull it.

CHAPTER ELEVEN

Becoming a Rainmaker One Rep at a Time

> *Technical excellence used to be the scoreboard. Now it's the floor.*

A few months ago I was coaching a tax lawyer named Elena. Ten years into her career, graduate of a top law school, one of the best M&A specialists in her practice. The partners loved her work. Clients asked for her by name. She had just been told she was on track to become a partner within the next two to three years, and she asked me what else she needed to do.

I told her the work itself would not be enough anymore. I said the associates who become partners now are the ones who read a client's business needs before the client says a word, who turn what they know into value the client clearly recognizes, and who treat every relationship as something they are actively building. She looked at me like I had changed the subject.

The Floor Moved, Nobody Told Her

For most of her career, technical excellence was the scoreboard. Spot the issue nobody else caught, structure the deal well, get the analysis right and get it done fast. Keep the clients and the partners happy. That used to be the formula, but now that AI does so much of it, she needed to do more. In fact, technical excellence is not even the price of admission now. It is beneath the floor.

I told Elena what separates the partners who take off from the ones who stall is not sharper technical judgment anymore. It is whether she notices what her client is worried about. It is whether she turns one matter into a deeper relationship, making it more difficult for competitors to get in. It is whether she can treat client development as a discipline she practices every day instead of something she performs only at conferences and when responding to RFPs.

And I told her why this matters more urgently today. AI has raised the floor on technical competence across the board. Firms are looking at the associates who show client development instincts early in their careers as the ones to bet on. Elena did not have ten years to figure this out. She had a much shorter runway, and so does almost everyone reading this.

Elena did not disagree with any of this. She already knew rainmakers did better than pure technicians. What she did not have was a way to turn that into an actual behavior change. Conceptually, becoming a rainmaker has always mattered. The difference now is that almost everyone coming up needs to become one, and no one seems to have handed anybody the playbook for how.

What I Learned From My Dumbbells

For years I tried to get healthier the way I approached everything else, with a formal plan. An hour in the gym, three or four times a week, with a disciplined training plan. It worked for about three weeks at a stretch. Then life got in the way, I missed a few days, the plan fell apart, and I started over.

What helped me create a better workout habit was not more willpower. It was accepting that micro workouts count. Some days, when I'm feeling great, I still put in an hour or more at the gym. Many days I do not feel it at all, and on those days I go to my basement, pick up some dumbbells, and run one circuit, one set per body part, ten reps each, under ten minutes total.

That circuit does three jobs. First, it gets me moving, activating muscles, and feeling better. Second, it reinforces my habit of keeping my fitness progressing on the days the full workout isn't going to happen. Third, sometimes a little bit creates the momentum to do even more than I expected. The bottom line is that a little bit beats nothing and helps me maintain a good habit.

What Builders Actually Do

The professionals who become true builders in the years ahead are not doing ten minutes of anything and calling it a career. They create a purposeful habit. They keep a standing cadence of client contact that does not require a specific reason. They reach out regularly instead of once a year during the holidays. They treat the clients they want to have like clients they already have, and they treat the clients they have like clients they want to keep forever.

When I laid that out for Elena, she said what most people say. That sounds like a lot. She did not have time to become that person overnight.

She was right that she could not become that person overnight. But she did not have to. I suggested she pick one thing. Elena started with an every Friday habit of sending one client a short note built from something she noticed that week about their business, not just a piece of technical insight. It took her less than ten minutes. Some weeks, when she had the energy for it, she picked up the phone instead. Six months in, two of those clients have started asking her opinion on things that have nothing to do with the deal in front of them.

Elena's rainmaking did not start with a plan. It started with a rep, repeated until it became who she is.

Land and Expand: Win the Beginning Game First

> *Overscope the first ask, and you can lose the relationship before it starts.*

In my first month running The Schuckman Group, I was sitting at my kitchen table in pajama pants and a T-shirt, drinking a cup of coffee and chatting with my wife, without much client work to do. You can imagine how pleasantly surprised I was to get an unexpected call from a prospective client asking me to price out a full year of training and coaching for their leadership team. I could have easily written that proposal. I had decades of pattern recognition behind me and a real sense of what the engagement should look like. Instead I proposed something smaller. Three months, with a narrow scope we could both evaluate honestly.

What surprised me was not that they said yes. It was what those three months gave me. I learned what the client actually needed by seeing it from the inside. I delivered an experience good enough to build greater trust. By the time the three months ended, the next piece of work was obvious, and I got to deliver that too.

We Attend the Open House, Then We Go Home and Do the Math

Think about the last time you made a major purchase you were excited about. A house is a great example. You walked through a big beautiful home at an open house. You pictured your furniture in the rooms, the dinner parties with friends, the holidays with family, and you were ready to sign on the spot. Then you went home, ran the numbers on the mortgage, and started having second thoughts. The house did not change. Your relationship to the number did, and you began thinking that maybe you didn't need such a big beautiful home.

The same thing happens with a car, a vacation, or a country club membership. The desire is genuine when you're standing in front of it. The hesitation shows up later, once the actual commitment is sitting in front of us in writing. Professional services proposals work the same way, and almost nobody in our business stops to see it from the client's side of the desk before they write their proposal.

Why We Try to Lock In Everything at the Signing Moment

Here is the instinct, and I have felt it myself. A client is asking for a proposal because they are ready to buy. You know you can do the work and you know they are ready to spend money to get what they want. So the temptation is to ask for everything right now, because going back later to ask for more feels like starting an entirely new sales process, with all its uncertainty.

And it's not just the fear of a second sales process. There is the pressure to perform well enough on the first phase of the engagement to earn more. There is also the human discomfort of having to ask again at all, of sitting across from a client and saying the work went well, now let us talk about doing more. Most people would rather avoid that follow-up conversation by trying to have it once, up front.

That instinct treats the proposal as the only door that will ever open. It rarely is.

Overscoping Kills the Deal Before It Starts

The problem is the same one that hits the prospective house buyer once they are back at their desk crunching numbers. The client who was ready to sign sees the actual scope and the actual fee, and the number feels bigger than the excitement that got them there. They start second-guessing the spend. Sometimes they walk away entirely. Sometimes they ask you to cut the proposal down so far that neither side is happy with what is left.

I have watched this happen to colleagues who did nothing wrong except try to capture too much value in a single ask. The work would have been good. The client would have been well served. But the size of the ask, presented all at once, triggered the same hesitation a mortgage payment triggers after the open house.

Sticky Relationships Are Built, Not Signed

The alternative isn't modesty; it's sequencing. Start smaller, and offer services at a size and scope that the client can most easily say yes to. Then, let the relationship get tighter before you ask for more. We call relationships like that sticky. Sticky relationships are the ones that keep producing work for years, because the client stopped asking for proposals every time a need came up. They just came back.

Nearly every long relationship I have built started this way. Small first step, deliver value, create more trust, and the client asks to expand before I ever have to bring it up. That is land and expand done correctly. It is not a technique for extracting more later. It is what naturally happens when you give a relationship time to get sticky.

Don't Lose the Game Before You Start Playing

Overscope and overprice at the outset, and you are not protecting yourself from future uncertainty. You are risking the entire relationship before it has a chance to establish.

Start small enough to get a yes. Do the work well enough to earn trust and to get more work. That is how you get to keep playing. That's landing and expanding. Overscope and overprice, and you sometimes lose the game before it even starts.

CHAPTER THIRTEEN

They Already Asked AI. They Need More Than That from You.

> *Clients aren't asking if AI can answer fast. They're asking what you see that it didn't.*

A few months ago I was doing a client satisfaction check-in for a small trusts and estates boutique, the kind of outreach a consultant does on behalf of a corporate client. I asked Angela, the CFO at a large family office, how things were going with her attorney. She paused, then told me something I have not stopped thinking about since.

Angela said, "I'm not sure my attorney realizes this, but before I ask them a question, I already ask my AI tool the same thing. I usually already have what I believe is the answer. When they give me the same answer with some wordsmithing, I'm disappointed, and I begin to wonder why I have an attorney at all."

That was concerning, and not just for the firm I was working for.

Since then, I've been surprised by how many other clients, across a variety of professional services, have told me some version of the same thing once I started asking. Clients are not asking their service providers blind questions anymore.

Everyone Reached the Same Place

Service providers are under tremendous pressure to use AI too, and they gravitate toward it for efficiency. When a client arrives with a position already formed and the firm responds with its own AI-assisted answer, both sides land at roughly the same baseline. The client paid for a service and received confirmation of something they already knew.

That is not a technology problem. It is a positioning problem. The firm mistook speed for value, and the client noticed before their service provider did.

Go Further Than the Baseline

Clients are not asking whether AI can produce an answer quickly. That's the baseline. What they are asking, whether they say it directly or not, is what their service provider, with experience and judgment, sees that they and AI did not.

The service providers who will win over the next several months and years are not the ones avoiding AI, and they are not the ones hiding behind it either. They are the ones using it to reach the same baseline the client already reached very quickly, so the actual engagement can start somewhere beyond that.

This is where I put AI to work as a collaborator. I use it to compare industries, test partially formed thoughts, or argue the other side of my own position so I can tighten up my perspective. I even ask AI to come up with things that stretch my thinking. Out of ten insights AI hands me, eight might be things I believe the client already knows or could easily find on their own. But one or two are worth drilling down on. That's where I focus, and that's how I derive benefit for my clients.

Where You Actually Add Something

The next time a client brings you a question, assume they have already answered it for themselves with the help of AI. Resist the instinct to hand them a nicer version of the same thing. Get to their baseline fast, confirm you are standing where they are standing, and then do the part only you can do. Tell them what they haven't yet considered. Tell them what a person who has done this a thousand times would do differently.

This is how you create value for your clients.

Beware of Getting Less for Less

Creating value this way requires a conversation firms are just learning how to have with their clients. It means telling a client you are spending less time on their work, and telling them in the same breath that the time you are spending is worth more than it has ever been.

The prep, the drafts, the compiling: that time is shrinking. What replaces it is time spent on judgment, pattern recognition, identifying opportunities and flagging risks. And that time comes from your most experienced people.

An hourly rate assumes time and value move together. Once AI cuts the hours, that assumption stops working. If the fee structure does not change with it, the economics and incentives stop working for all parties.

Move to fixed fees wherever you can. A fixed fee ties the fee to what the work is worth, not to how long it took to produce it.

It Starts With a Mindset

Professionals who are builders in the coming years will be the ones who understand that value comes from deeper insight, from judgment under pressure, from reducing risk a client cannot see on their own, from identifying the opportunity that creates attention-getting returns.

That is a mindset shift before it is a pricing shift. The old game was getting things done faster. Now that's table stakes. The new game is getting it done at a level the client could not have reached on their own, using human intellect and AI collaboration as the method.

Angela's AI tool gave her answers that were just as good as her attorney's. That was the problem. She never told her attorney why she was disappointed. She just started wondering why she had one. Most professional services firms are still racing to be faster, and their clients already stopped caring about that.

CHAPTER FOURTEEN

Like Any Great Relationship, It Takes Nurturing

> *The wedding is not the marriage.*

I coached a pursuit team through eight months to win an engagement large enough that people across the firm were tracking it long before the client even sent out the RFP. I sat in the room the night before the final presentation while they rehearsed the pitch twice, tweaked their slide deck, and ran it again. Somebody ordered pizza nobody ate. Two weeks later the call came through that they had won. The partner leading the team called me with the good news before he called his own boss.

Three months later I had lunch with that same partner. I asked how the engagement was going and he gave me the kind of answer that tells you as much by his body language and tone as the words he used. Half the team that won the work was now on to other things. Onboarding had been dragging. He had only been to the client's offices twice since the contract was signed, both times for scheduled status meetings. Everything had peaked the day the contract was signed. Then, the great stall began.

The Celebration Ends, the Relationship Doesn't

A marriage does not run on the energy of the wedding day. You plan the wedding for months and then you spend the next forty years learning more about, and growing with, the person you married. The couples who treat the wedding as the finish line are the ones sitting in counseling five years later wondering what happened.

A house is the same way the morning after closing. The inspection is done, the papers are signed, and now the roof still needs attention and the pipes still age. Ignore them long enough and you will be dealing with a flood, not a drip.

The pursuit had a finish line, months of preparation building toward one decision and a signature on a contract. The client expected everything to continue at the same pace, with the same urgency and energy. They chose you over your competitors, they told their own boss why your firm was the best choice, and every week that goes by without the urgency they were promised is a week that makes their decision look worse.

That is the real cost of the great stall. Not a single dramatic failure, but a client quietly recalibrating what they think they bought. By the time the account team notices the relationship has cooled, the client has usually already noticed first, and started taking calls from whomever they turned down the first time.

What a Different Team Did in Week One

I watched a different team handle the same situation completely differently. Ten days after signing, the partner called me, not to celebrate, but to talk through a candidate she had identified to manage the entire engagement, Andrew. She had watched him on a smaller account and wanted him on this one as project manager, but with a wider lens than the title suggested. She wanted him watching the relationship, managing deadlines and deliverables, and staying alert to opportunities to improve and grow the engagement.

When Andrew was introduced to the client, his first move was a question directed at the client, asked sincerely and without an agenda attached. "What are you personally being measured on this year?" The client told him, in detail, things that had never once appeared in the statement of work. Andrew wrote it all down, brought it back to his team, and told them this was now their charter. Not the contract, the client's personal plan.

Align Before You Deliver

A year later, that team was still measuring themselves against the client's personal goals, not the contract terms. They had realigned twice already. The client's own company went through a reorganization, and the executive who had sponsored the original engagement picked up two new business units overnight. Andrew's team adjusted their plan within a week of hearing about them, before the client even asked them to.

The partner, Andrew, and the entire team kept meeting new people across the client's organization, long before there was any urgency to do so. None of it was complicated. It was just uncommon, because it required deciding on purpose to keep operating with the urgency that won the engagement instead of assuming the win meant the hard work was done. Two years in, that client expanded the scope twice without a competitive process.

Look at Your Own Accounts

Take a fresh look at your existing engagements. Who is your team, and how are they nurturing the client relationship? Do they know what your client is personally being measured on this year? Did they even think to ask?

If you cannot answer these with confidence, you have found a relationship that is at risk of deteriorating. The good news is the fix is not complicated either. It just requires deciding, on purpose, that the wedding was not the marriage.

CHAPTER FIFTEEN

Reflecting on My Habits That Outlasted the Firm

> *Builders don't retire. They just keep building something new.*

Fourteen months ago I was walking my dogs on the same stretch of Quidnet Beach where this whole Builder Mindset series and this book were envisioned. Back then, I was planning the launch of The Schuckman Group. My brain was spinning while the dogs pulled me along. I needed a system to track client work, project plans, contracts, every email. I needed a way to run payroll and pay contractors and keep my finances well organized. I needed a bookkeeper, an accountant, an attorney, and a bench of people I could call when a project needed more hands than mine. I was on LinkedIn and on my phone posting, texting, and calling everyone I knew to tell them I was starting a business.

I thought all of it would happen fast. It did not. But the part that surprised me was not how long it took to build the systems. It was that everything I had learned about growing a business over four decades inside a large firm, much of it while leading substantial business development initiatives, held up perfectly once there was no organization behind me anymore.

There Is No Finish Line Anymore

Inside a large firm, there is always a next milestone even if nobody says it out loud. Make senior manager. Make partner. Grow your book of business. Save money and retire well. The whole career has a shape to it, with checkpoints built in along the way.

Running my own firm removed every one of those checkpoints overnight. What replaced them was not a new set of milestones. It was a continuous game with no finish line at all, just relationships to keep building, work to keep doing well, and a next conversation always worth having.

The Filter That Kept Me Honest

Figuring out what to charge was one of the hardest things I did in the first few months. There were no margin goals handed to me, no committee setting my pricing. I landed on my own pricing filter instead. Price it in a way that stays true to what I believe the work is worth, while also making it hard for the client to say no. Do good work and more work will come. My whole approach to growth has become one big land and expand.

This is the same discipline I have been writing about throughout this book. The pursuit habits, the listening, the relating, all of it comes back to one thing. A builder has habits and plays that make the business expand because they have set the stage for it, long before they need it to.

Meeting People Without an Agenda

The networking mattered just as much, and it looks nothing like what people picture when they hear the word. It means talking to people and building relationships with no expectation of a client or a project on the other end of the conversation. Most of it produces nothing you can point to. Some of it produces opportunities you would never, ever have imagined.

Writing this series was part of that. So was my book. So were a handful of speaking engagements I took at a fraction of what I would normally charge, because the room was full of people I wanted to know. None of it came with guarantees. All of it came from the same instinct that used to make me pick up the phone and call a client for no reason other than curiosity.

That instinct is not a firm's asset. It is a builder's asset, and it works exactly the same whether you have tens of thousands of people behind your name, or just yourself.

Building Is Not a Job Description

What I have come to understand is that being a builder was never actually about the firm I worked for. It was never a role assigned to me, a line on a business card, or a phase of a career that ends when you hit a certain title.

It is a way of paying attention to people and to opportunities with empathy and curiosity. The big firm gave me a place to practice for almost four decades, and I'm still practicing as an entrepreneur.

The professionals I have coached who struggle most after a major transition, a retirement, a layoff, a firm change, are rarely the ones who lost their technical skill. They are the ones who let the firm's structure do the building for them, and never built the habits for themselves.

The Habit That Outlasts Everything

This book started with a war for clients that professional services firms are only beginning to understand. It moved through the muscle of curiosity, the discipline of listening, the power of a compelling story, and what it actually takes to keep a client once you have won them. Every one of those chapters was really about the same thing.

The war was never about firms. It is about individuals who never stop building, in any job, at any firm, at any stage of a career.

Having an everyday business development mindset is just how I live in business, and it will be how I live in business until I decide I am done playing the game. Builders don't retire. They just keep building something new.

ABOUT THE AUTHOR

Mitchell Schuckman spent nearly four decades inside a large global professional services firm, serving senior clients, leading competitive pursuits, and coaching leaders at every level. He led substantial business development initiatives including serving as his firm's global pursuit and proposal leader for over ten years. He is a Professional Certified Coach credentialed by the International Coaching Federation, trained at the Hudson Institute of Coaching, and the author of ***I'll Tell You a Great Story: Building Closer Relationships and Winning in Business Through Storytelling.***

Today, as Founder and CEO of The Schuckman Group LLC, he works with executives, rising leaders, and teams across professional services who are ready to build the relationships and habits that grow a practice. His work spans individual coaching, team programs, and pursuit coaching for firms preparing for their highest-stakes pitches.

If this book was useful to you, the conversation doesn't have to end here.

Scan to learn more about working with Mitchell and The Schuckman Group.

theschuckmangroup.com

The Builder Mindset is the second book from Mitchell Schuckman. His first, ***I'll Tell You a Great Story***, is available wherever books are sold.