Symbioss
Transforming relationships, unlocking growth

The asset few organisations manage well

Eight findings on relationship capital, and four conclusions worth acting on.

WHAT THE RESEARCH SHOWS

01 Ranked a top three asset by most

Over half of professional services organisations rank relationship capital top three; one in seven put it first.

02 Rated critical by 88% of respondents

88% of professional services respondents say managing relationship capital is critical, and just 10% rate it as merely important. The survey is BoardEx's own.

03 Few use the systems they already buy

39% of professional services organisations have no relationship management platform, and of those that do, only 11% almost always use it to find new work.

04 Poor CRM data is costing revenue

62% of marketing professionals say poor CRM data loses their organisation revenue, and only 41% have a named owner for data quality. Vendor survey, UK included.

05 85% say relationship capital puts them ahead

85% of professional services respondents say relationship capital has given them an advantage over competitors; only 7% say it hasn't.

06 70% of board measures are about you

70% of the measures on B2B leadership dashboards describe value to the supplier. The organisations growing fastest use 22% more measures of value to the client.

07 Six in ten B2B clients are indifferent

Gallup: 60% of B2B clients are indifferent to their supplier, 11% actively disengaged, just 29% fully engaged.

08 Key client focus links to better results

Across 568 European B2B suppliers, a strategic focus on key clients goes with higher self-reported market and financial results. Rigid process weakens it.

WHAT THIS MEANS FOR YOU

01 Manage clients as carefully as you manage the money

Agreeing that client relationships matter costs nothing and changes nothing. Apply the test you would apply to any other asset: who is accountable, what is the record, when was it last reviewed. If those questions have no answer, the asset isn't being managed. Drawn from findings 1, 2 and 3.

02 A system only pays for itself if people use it

Most organisations either have no system or have one nobody uses to find new work. The software isn't the decision. What decides whether it pays is whether someone owns it, keeps it current and is asked about it, because a record nobody owns goes stale and costs you work. Drawn from findings 3 and 4.

03 The board manages only what it can see

Your board reviews value flowing towards you and almost never reviews value flowing the other way, so an indifferent client looks just like a loyal one until they leave. Add two or three measures of value to the client next to revenue and pipeline, and losses start showing early enough to act on. Drawn from findings 6 and 7.

04 Relationship capital can be built

None of this needs a programme to begin. Name someone responsible, record who holds each relationship and review it, starting with the clients you can't afford to lose. Drawn from finding 8.

Sources by finding 01, 02, 03 and 05 BoardEx, professional services survey (2020, vendor research, sample unpublished) · 04 Validity, State of CRM Data Management in 2026 (vendor survey) · 06 Forrester, Value Balance Framework (2020) · 07 Gallup, B2B customer engagement · 08 Fakhreddin et al., Industrial Marketing Management (2025). July 2026

Protect revenue | Reduce relationship risk | Create more reliable growth