THE DECISION SEQUENCE
MARKETING BUILT AROUND HOW PEOPLE DECIDE

Proximity Is No Longer Measured in Miles

ENGAGEMENT SUCCESS IN AN AI WORLD

The closest firm used to be the one down the street. Somebody moved it.

From the Author

For most of my career, I was hired by the firms that weren't supposed to win.

The job was helping outsiders carve out opportunities against an incumbent, and we did it often enough that I stopped being surprised when it worked.

What I didn't expect was watching the local incumbent's advantage disappear on its own, quietly, while the firms that relied on it kept operating as though it was still there.

If you've been the incumbent, being local has gone from your best asset to something close to a liability. And if you're starting to hear competition coming from firms you've never heard of...this one is for you.

joe worden

IDEA IN BRIEF

THE PROBLEM

For a long time, professional-services firms got a large share of their credibility from being close by. Clients knew the partners, heard the name around town, and often got a recommendation before the issue felt urgent. Familiarity made the local option safe, long before they had to prove much.

THE SHIFT

Online discovery reversed the order. Clients can size up a firm before reaching out. COVID made remote professional relationships normal, and specialization gave buyers a reason to look past the firms they'd always known. Now AI is pushing the change further by translating and sorting expertise before a prospective client ever returns to the source.

WHAT FIRMS MUST DO

A strong local name still helps. But it can't carry expertise the market can't see. Firms have to stay close to the real problem intellectually and describe it clearly enough that clients recognize themselves in the writing before any first conversation happens.

"B2B buyers are progressing through critical buying tasks in more autonomous ways, and sellers can't rely on static collateral to carry influence in those moments."

Alyssa Cruz, Senior Principal Analyst, Gartner Sales Practice, March 2026

1: Call them, their office is literally right down the street.

Credibility once came, in part, from the address on the letterhead. People recognized the partners, heard the firm mentioned at dinner or on the Little League sidelines, and often got the name from someone they trusted before the pressure arrived. With that groundwork already there, picking the firm across town felt low-risk, and the firm didn't need to explain itself in much detail.

Then the sequence shifted. Search gave buyers time, and tools, to read and compare before making contact. COVID made video calls ordinary. Specialization pulled attention away from familiar generalists. Now AI often encounters a firm's thinking first, scanning it, summarizing it, and handing a version of it to the buyer before the buyer ever lands on the firm's site.

Community reputation still matters. It just can't prop up know-how that stays out of sight. What works now is being close to the client's actual situation on the page, naming it plainly enough that the client feels understood before any meeting gets scheduled.

02: Nobody had to go hunting

There was a time when towns seemed built around practices like these: the accounting shop everyone used, the law office tied to every owner in the county, the consulting group that "handled IT" for half the local market. Nobody had to go hunting. The names were in the air.

Partners coached youth teams, sat on the hospital board, showed up at fundraisers, ate in the same places as the people who later signed the engagement letter. When something broke, the search was short, a call to a friend, a name repeated, the office just down the street.

The hospital board seat used to be a marketing channel.
Now it's called volunteering.

Distance wasn't the real advantage. The real advantage was that people had watched the partners in normal settings, heard the firm referenced casually, and knew someone willing to vouch. When the serious issue surfaced, the firm didn't feel like an outsider waiting to be evaluated. It felt like the obvious first stop.

Familiarity also gave cover. A board could justify the local choice because others had done it, too. If things went poorly, nobody had to explain why they took a risk, they picked what "everyone" picked.

And proximity narrowed the field. Business happened face to face. Crossing state lines added friction. So clients leaned toward advisors they could see without much effort. A specialist a few states away might have had deeper experience, but starting that relationship felt heavier. The nearby firm mainly needed to stay acceptable within the set the client could reach.

That's why broad positioning survived for so long. Firms described themselves in roomy, general language because most outsiders never entered the picture anyway. People sometimes called it a good old boy arrangement, and while the phrase stung, it pointed at something real: years of local memory and ties, built slowly.

Geography did part of the selling without ever appearing as a line item. Quietly it turned recognition into comfort, and comfort into trust. Plenty of firms built durable businesses by serving their towns well, and a few mistook those conditions for a permanent advantage.

The offices still opened. Partners still show for local events. The work didn't become worse.

What changed was where the decision began.

03: Honestly, it just seemed like a nicer brochure

When the internet arrived, it didn't look disruptive from inside many firms. It looked like a cleaner way to share the same material. Websites replaced printed brochures. Email took the place of faxes. Articles moved online. Still, the relationship seemed to start when everyone sat together.

That reading missed the deeper change. Buyers started doing, ahead of time, the work that used to happen in the room. They read posts, downloaded reports, watched webinars hosted by people they'd never met. The first conversation used to be where the advisor framed the problem. Now the buyer could frame it alone.

So when the phone finally rang, the buyer might already have a workable picture of what was happening, plus opinions about which firms understood it. The entry was later than assumed.

Marketing had to do a different job. A website couldn't act like a digital leaflet that simply proved the firm existed. An article wasn't just evidence that a partner could write. Those pieces began carrying early-stage weight, letting the buyer judge whether the firm actually saw the issue and could name it clearly enough to help.

Most B2B buyers now do the bulk of their research before contacting providers. The practical point is plain: a firm can believe the choice begins with a referral call, while the client has already spent weeks weighing options.

> *"Hidden buyers actively discover, consume, and evaluate thought leadership just like target buyers."*
>
> *2025 Edelman-LinkedIn B2B Thought Leadership Impact Report*

That quiet period is where location first lost its grip. Personal familiarity wasn't required to learn from a firm. Expertise could move through a screen long before names were exchanged.

COVID removed much of the remaining hesitation. Conference rooms went dark. Video meetings became the default. Shared tools replaced many in-person sessions that firms once insisted had to happen in the same place. Daily meeting participants on one major platform jumped from a peak of ten million to more than three hundred million in four months. That number says more about adoption than trust, but it shows how quickly remote work stopped feeling strange.

Clients hired lawyers they never met in person. Audits continued without teams camped in client offices. Consultants were brought in without anyone knowing what their meeting rooms looked like. Buyers got used to closing sizable deals online or face to face.

The new way wasn't always easier. The old way wasn't always clean either. The point was the realization that serious work could happen without everyone sharing a building.

Once buyers accepted that, geography stopped deciding who even made it into the running.

04: The market can't value what it can't see

With the field wider, specialization became clearer and harder to ignore. When the problem is serious, buyers rarely begin by asking who has the biggest menu. They ask something closer to: has this firm seen this before, or am I about to spend the first hour teaching them what's going on?

Specialization signals focus without boasting. Doing the same kind of work repeatedly suggests pattern recognition. For a client who worries about paying someone to learn in public, that signal lowers perceived risk.

None of this makes the specialist automatically better. A narrow firm can be thin, and a generalist can bring steadier judgment across the full picture. Still, the market can't value what it can't see.

Many established firms stumble right here. They carry real experience, then wrap it in language so broad that the buyer can't locate the relevant piece inside the specific situation.

Trusted advisors. Exceptional service.
Decades of experience. Tailored solutions.

Any firm can say those things. They don't help a buyer decide who understands this exposure, this industry, the pressures circling this choice. Broad claims make the client translate. Specific description helps them with that translation.

05: Without the partner in the room

Buyers want more than credentials, they want recognition. Recognition arrives when a firm names the problem in terms that match the client's reality. It catches the tension the client hasn't managed to articulate. It points to the consequence everyone senses but nobody has written down. Long before services or fees come up, the reader starts to believe the firm actually sees the issue.

73% of B2B buyers actively avoid suppliers who send irrelevant outreach. 69% report inconsistencies between what a supplier's website says and what its sellers say.

Gartner, survey of 632 B2B buyers, August–September 2024

That's intellectual proximity: the sense that the advisor understands the problem from inside the client's world. The firm notices the tradeoffs, and the part of the decision that never makes it into the formal scope. Its language fits closely enough that the buyer doesn't waste the first meeting correcting the frame.

The space between the client's problem and the advisor's grasp shrinks.

Sometimes that closeness starts with a single article. A reader hits a line that says the thing the internal team hasn't been able to say. The piece separates the surface problem from the decision underneath, and it names the risk circling the choice. The client pauses.

They get it.

That moment isn't trust, not yet. It's a reason to keep going.

Intellectual proximity builds through repeated recognition. The firm keeps showing it sees the situation cleanly. The view stays coherent as the buyer moves from an article to deeper reading and then into a conversation. Each step reduces the translation friction the client would carry.

Over time, the firm feels less like a stranger. Understanding, not location, becomes the basis of the relationship.

That creates an opening the old model rarely offered. A smaller firm with a clear point of view can reach clients well beyond its regional name. Expertise can travel farther than the partner, but only if the thinking stands on its own, without the partner in the room.

06: Dressing for the scanner instead of the meeting

For most of the internet era, digital discovery worked like a library: search, scan the results, pick what's worth time.

AI changes the order. A buyer can now ask a system to explain an issue, compare approaches, or point to specialists. The system can meet a firm's ideas before the person ever reads the article those ideas came from.

AI is the interpreter sitting between expertise and the buyer.

Thirty years building a reputation, and now something summarizes it in four sentences. It gets one of them wrong.

It isn't inventing the firm's knowledge. It's reading what the firm has published and returning a version of it. That version can be accurate or incomplete, but it still shapes first impressions. Before a buyer reaches the website, AI might already have condensed the firm's stance below competitors.

The bigger change isn't captured by a single statistic. AI is becoming part of how people find and consume expertise.

That doesn't mean firms should pump out pages just for machines. That's the professional-services version of dressing for the scanner instead of the meeting. The decision still belongs to a person trying to choose well.

What AI does do is raise the cost of loose thinking, because vague language collapses into sameness. If five firms call themselves experienced and client-focused, neither a person nor a system has much reason to separate them. A precise point of view keeps its shape even after someone else summarizes it.

Firms don't need bigger claims. They need distinction that remains when the introduction is no longer theirs to control.

Serious decisions almost never move from first glance to commitment in one clean step.They all require trust, which builds in stages: relevance, exploration, evaluation, and confidence. Early discovery doesn't finish the choice, it decides whether the firm earns more attention.

A relevant article helps the buyer name what's happening. A clear view can reduce uncertainty enough for the client to keep reading. Consistent evidence gives evaluation something to work with. Repeated moments of accurate recognition build confidence. The buyer watches the firm handle the issue well across several encounters.

Trust still has to be earned. Visibility doesn't create it. AI can't hand it over. A referral doesn't complete it. Each might keep the client moving, none ends the decision by itself.

That's why generic content costs more than it looks like it should, even if it's cheap to produce. It fills space without moving the buyer forward. Intellectual proximity matters because it shortens the internal distance inside the decision, helping the client move from noticing a firm, to seeing it as relevant, to feeling enough confidence to engage.

07: Becoming the firm closest to the problem

The accounting practice is still in town. The law firm still sponsors Little League, and partners still sit across real conference tables. None of that has become worthless.

It has simply lost the power to protect the firm on its own.

Clients can search farther and form opinions before anyone at the firm knows the decision has started. Specialists outside the region are easier to find, and machines can interpret expertise before a buyer ever reads the source. The field has widened, and the old edge is easier to overestimate.

The local moat is weaker. The need to feel understood isn't.

That's the reality professional-services firms have to accept. Proximity still exists, but now it lives in the client's judgment about who sees the problem most clearly.

Geography might still earn a look. Understanding earns the next step.

Become the firm closest to the problem.

08: How to navigate

Decide which problem you want to feel close to

Everything else depends on this decision. Intellectual proximity can't be built around a menu of services. Services tell the market what you sell. Proximity grows around what the client is trying to make sense of, avoid, or achieve.

> *Every firm says it's a trusted advisor with decades of experience and a client-first approach. I've written a version of that line more times than I want to admit. It never once helped a buyer choose.*

Pick a problem narrow enough to be recognizable. That doesn't mean dropping your broader range. It means giving the market a clear signal about where your experience becomes unusually useful.

Don't start with AI parsing. A generic firm doesn't become distinct just because its pages read neatly to a machine. Start with the problem, then build evidence showing a true understanding.

Write for recognition before persuasion

Many firms lead by proving they're qualified. The buyer is often still checking whether you understand what's actually happening.

Name the problem before you present the solution. Explain where clients commonly misdiagnose it, and point out what even strong teams can miss. The goal isn't to show off. It's to help the reader see more clearly.

That's the first step toward intellectual proximity.

Build a body of work that holds together

Consistency isn't posting the same claim under a new headline every week. It's returning to the same defined problem from several useful angles. One piece explains the risk. Another shows a common decision mistake. A later one questions the standard industry response. Taken together, they show you know the territory and you've thought about it long enough to hold an actual position.

Disconnected content proves you're publishing. A coherent body of work creates recognition.

Protect the moments where trust gets tested

Digital experiences can create intellectual proximity, but eventually the relationship reaches a moment where prepared language stops working. A buyer asks a hard question, a stakeholder challenges the recommendation, or you have to admit a limit without the cover of a polished piece.

That's where the trust implied by the writing gets tested.

The writing should earn the conversation. The people still have to deserve it.

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Foundations

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