
— INTRODUCING — THE PROFESSIONAL & TECH-ENABLED SERVICES POWER CIRCLE

Your partners have a peer group. *You should too.*

A confidential, peer-only circle for PE-backed CEOs running professional and tech-enabled services firms — advisory, accounting, legal, RIA platforms, vertical SaaS-services hybrids. Small. Curated. By invitation.

FOR

PE-Backed Services CEOs

FORMAT

Eight Seats · Monthly · By Invitation

COHORT

By Referral or Invitation

The services CEO sees patterns across partners, clients, platform economics, and capacity that no single partner or product lead ever sees — but has nowhere to compare notes without it leaking into the firm.

— WHAT PROFESSIONAL SERVICES CEOS WORK THROUGH

The conversations that *don't happen inside the firm.*

Not business challenges. The structural tensions that live at the intersection of the partnership and the sponsor — and nowhere else.

RUNNING TWO AUTHORITY STRUCTURES

The services CEO answers to partners who built the firm and a sponsor who bought it — most peer rooms are built for one, not both.

THE HOLD-PERIOD CONSTRAINT

How aggressively you invest in the platform when the exit timeline is shaping your risk appetite — and who you can say that to.

WHAT YOU SEE ABOUT THE FOUNDER THAT CAN'T STAY INSIDE

Founder fatigue, succession gaps, and equity misalignment are visible from the services CEO seat before they're visible anywhere else.

AI INSIDE THE DELIVERY MODEL

Whether productivity gains in the delivery model belong to the firm or the pricing conversation — and who's deciding.

THE PARTNER CONVERSATION THAT NEEDS A SECOND READ

The alignment, equity, or succession question that's better worked through before it shows up in a partner meeting.

— WHAT'S IN THE ROOM

Four standing assets, *built for the services seat.*

Not coaching. Not a peer group. A working circle with the assets behind it.

01

THE CIRCLE
Monthly Working Session

90 minutes. Eight CEOs. Member-submitted scenarios on partner conflict, platform trade-offs, and succession. Confidential, off the record.

02

THE LIBRARY
CEO Pattern Library

The Three Seasons framework, eight CEO archetypes, and the field-tested diagnostics — applied to services and tech-enabled realities.

03

THE BENCH
Direct Access

1:1 calls with Matt Sharrers and the Navigator coaching bench when a partner, platform, or board moment needs a second read.

04

THE EDGE
AI Operating Hours

A monthly session on how services CEOs are actually using AI inside the delivery model and platform — current practice, not theory.

— WHY IT WORKS FOR SERVICES CEOS

- The services CEO runs two authority structures at once — a distributed partnership and a concentrating sponsor relationship. Most peer rooms carry one.
- Sharper reads on partner alignment, platform economics, and succession before they show up in a board meeting.
- A confidential bench when a partner or platform conversation needs a second read before it happens, not after.

— THE PREVIEW SESSION

A 60-minute working preview for prospective members. Meet two current CEOs, walk through a live partner or platform scenario, and leave with the eight-archetype packet — whether you decide to join or not.

The services CEO runs two authority structures at once — *a partnership where authority is distributed, and a sponsor relationship where it concentrates upward.* Most peer rooms are built for one structure or the other. This one is built for the seat that has to hold both.

Drawn from 212 one-on-one CEO conversations across 54 PE firms.

— RESERVE A SEAT

The CEOs already in the room are not looking for content. They're looking for a place to say what they actually see inside the partnership, with peers who see the same things. The preview session is built to show you the room before you sit in it.

— Matt Sharrers, Co-Founder, ETJ Life