

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

complications. Among them are converting compliance clients to CAS, securing buy-ins from partners and practices, establishing a marketing plan and marketing resources, optimizing ...

Oct. 28, 2019



*In part one of this three-part series, Pete Potsos, CPA, of Bill.com discussed how to set the stage for CAS, and in part two of the series Vishal Thakkar, director of alliance marketing for CPA.com, shared how to be strategic in your CAS offering. This last article in the series will focus on how to scale CAS by actively adding more clients and building resources to support it as it grows.*

If you're reading this, you've likely already put in the hard work required to establish a full-fledged CAS offering. You've fully automated your processes, and you're already

delivering a range of real-time CAS offerings to your clients, including

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

entirely done. Let's take a look at how you can overcome the hurdles that may be impeding your efforts to scale your CAS practice.

## Identifying Challenges with Scaling CAS

Firms looking to scale their CAS offerings frequently face some common complications. Among them are converting compliance clients to CAS, securing buy-ins from partners and practices, establishing a marketing plan and marketing resources, optimizing your tech stack, and attracting and retaining qualified CAS staff.

In order to identify and prioritize these hurdles, it helps to step back and analyze your CAS operations. If scaling CAS is an ongoing struggle for your firm, start by asking yourself the following questions:

- Are our resources being used as efficiently as possible?
- How can I get my CAS client base to grow more quickly?
- How can I convert compliance clients to CAS?
- How can I turn partners in other practices into advocates for CAS?
- How can I help my firm understand the importance of CAS?

Answering these questions can put you on the right path to successfully scaling with long-term effects.

## Common CAS Scaling Best Practices

The most successful CAS practices embrace – in one form or another – some key best practices.

First, it's important to educate other practice areas on the value of CAS. One of the most important things you can do is gain supporters within your firm. How have clients benefited from CAS? How does that benefit the firm? What are signs that a

client may be interested in CAS? CAS practices can involve everything from

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Third – and this will come as no surprise – market CAS extensively. Have marketing plans in place for both short- and long-term goals and execute them across multiple areas such as email, social media, events, and more. Turn to a network of technology vendors and other friendly referrers (partnerships, other firms, etc.) to enlist help in spreading the word. Technology providers and other vendors may even offer out-of-the-box marketing materials and advice that can boost your buy-in both within the firm and with your clients.

## **The Summit CPA Group Journey**

Let me share with you some background information on how Summit CPA Group has evolved and the journey we experienced. In less than 10 years we have grown from \$500,000 to over \$5 million in annual revenue. Most of this growth has come from CAS. Over the years we have learned how to transform our tax clients to monthly write-ups clients, write-up clients to weekly real-time accounting clients, and then weekly real-time accounting clients to virtual CFO advisory clients. As a result, we work more intensely with a smaller client base but in a much more meaningful fashion. However, as a result of this rapid CAS growth, we did face hurdles with scaling and learned firsthand how to address them, which is why we wanted to outline the steps above to help others in this journey.

## **Our Firm's Challenges**

When you take on real-time responsibilities essential to a client's day-to-day operations, it is important to be available. However, being available all the time is not possible or efficient. We found that managing client communications and responsibilities was a challenge. We addressed this issue by setting clear processes and using tools such as Bill.com, Expensify, and QuickBooks Online. We worked with

each of our clients individually to map out their current process and make

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

the same page.

## The Takeaway

CAS is a powerful way to move your firm to the next level.

Now that you have taken the time to have a full-fledged CAS offering, making sure you are getting buy-in from your partners internally, putting the right marketing efforts in place, optimizing your tech stack, and retaining qualified CAS staff to ensure you are on your way to being a long-term trusted advisor to your most valuable asset – your clients.

Offering CAS to your client base not only helps you boost your profits, it also helps your clients gain more time and insight into their businesses. Be proud of yourself! Having CAS is a differentiator for firms today, but it will soon be expected by all clients. You are already there! Make sure you stay ahead of the technology that is out there and keep your firm moving in the right direction.

To learn more about CAS, download the Client Accounting Services eBook from CPA.com – “Accelerate into Advisory.” [https://www.cpa.com/whitepapers/accelerate-advisory?utm\\_source=BDC&utm\\_medium=ptnr&utm\\_campaign=PoC-ebook-19](https://www.cpa.com/whitepapers/accelerate-advisory?utm_source=BDC&utm_medium=ptnr&utm_campaign=PoC-ebook-19)

=====

Adam Hale, CPA, is COO, and Co-founder of [Summit CPA Group](#) where he provides coaching for CPA firms looking to build out their CAS practice.

Advisory • Firm Management • Technology

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us