

Fetch Insights

How to SPRING into CAS

A Step-by-Step Framework

USES

Customer Acquisition Cost

- Paid Search · 37%
- Organic Search · 28%
- Social · 20%
- Referral · 7%

Industry average

25%

Investing on high-social media

Operational Costs

Marketing ratio

27% ^ 5.7%

Industry average

21%

Insight

You could benefit from exploring automation tools to reduce labor costs.

Employee

Marketing ratio

34% ^ 5.7%

Insight

You could benefit from upskilling employees to increase productivity.

Customer Growth Rate

Marketing ratio

17% ^ 5.7%

Industry average

25%

Market Share

Marketing ratio

42% ^ 5.7%

Introduction



FincenFetch & FetchInsights

Charles Wismer

Advalis CEO

Charles Wismer is a thought leader in FinCEN compliance and professional services software solutions. As CEO of Advalis Inc. and co-creator of FincenFetch, Charles has guided products that equip over 1,000 firms with specialized tools for emerging service lines—including robust Beneficial Ownership Information (BOI) reporting—responsible for nearly \$50MM in new firm service billings for regulatory support. The new Client Advisory Services (CAS) solution FetchInsights is built on feedback from firms to ensure it meets the evolving needs of CPAs and the accounting industry.

Why CAS?

How firms are scaling

How to launch CAS

SPRING to launch and scale CAS

What am I delivering to clients?

Planning deliverables with CAS

CAS launch resources

Take this all to-go

** Parts of this will be a launch reference. Ask your organization for the download page for this guide. **

WHY CAS?

Data from the CPA.com benchmark report and wider accounting industry

CAS drives revenues of \$1K-\$5K monthly per client, with practices averaging \$1.6MM to \$2.8MM and expected to double in three years. It's a scalable, high-margin opportunity firms can't ignore.

Firm Growth

\$1.6MM - \$2.8MM

CAS Practice annual revenue

67 (median) to 102 (top) clients served.
Calculates to \$1,900 to \$2,300 for
monthly engagements.

Firm Growth

2x Growth

Growth

CAS practices report 17% median
revenue growth compared to just 9% for
traditional firms.

Firm Growth

\$3.3MM - \$5.4MM

Projected 3 year revenues

Firms are projecting 99% CAS growth
over the next 3 years.

Per Client

\$1K - \$5K

Monthly per CAS Client

with \$3,000 to \$3,250 typical for
higher-level engagements (non-CFO).

Per Client

\$18K - \$23K

Annually per CAS Client

with each staff member supporting 7 to
10 engagements.

Per Client

\$70B

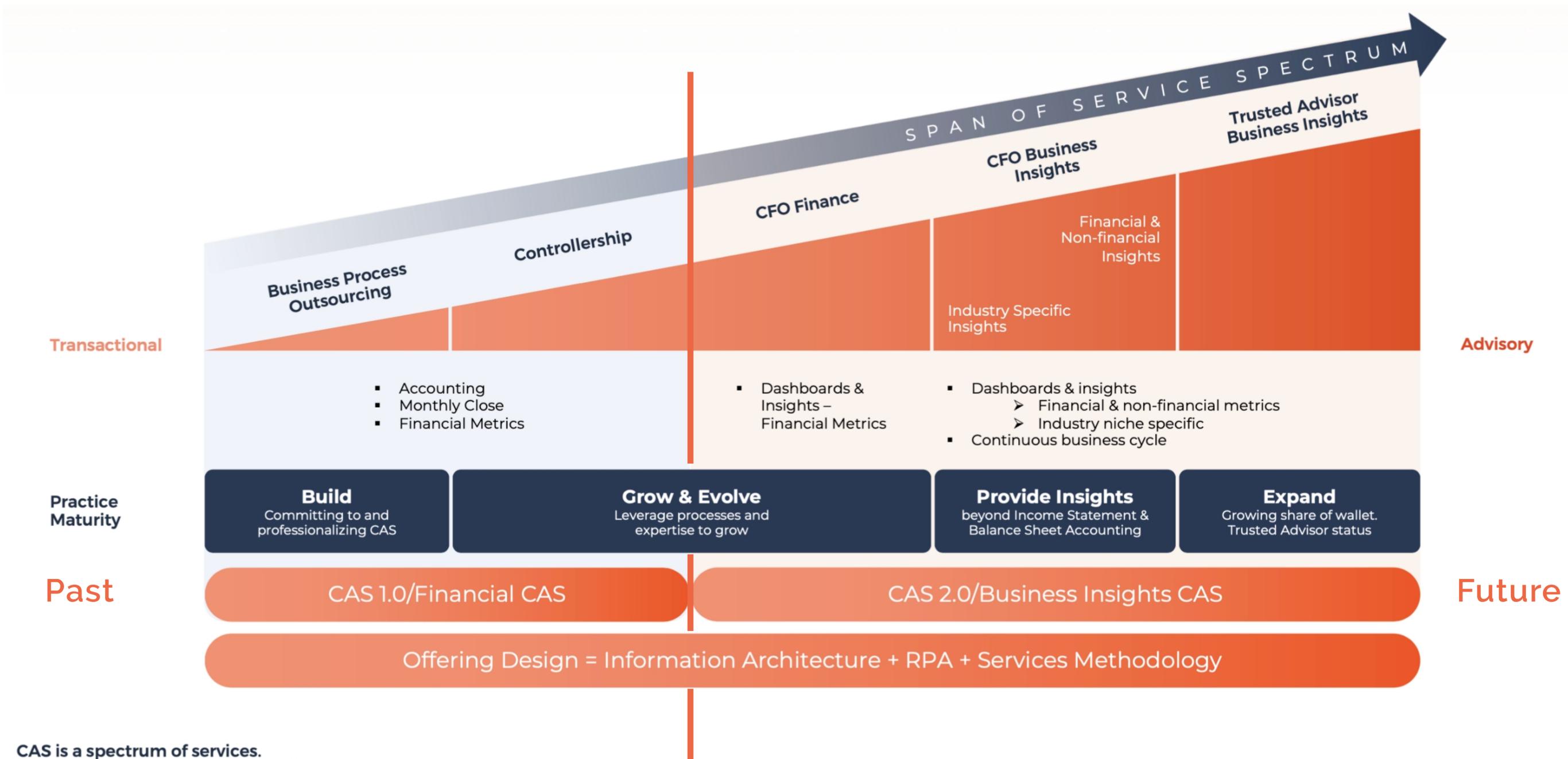
CAS Market

\$70 billion client advisory services
market generated by accounting firms.

BUT...

How do you launch CAS?

Launching CAS shouldn't feel like assembling IKEA furniture blindfolded.



SPRING into your CAS launch

Launch CAS with an easy, memorable launch framework in days instead of months.

S

Scope Services

Use the **CASH Framework** to clarify your CAS offerings.

P

Plan People

Assign members to Growth and Engagements.

R

Rates & Packages

Decide market-aligned offerings bundling existing services.

I

Integrate Systems

Build systems or license software to sell, deliver, and manage CAS.

N

Notify Clients

Announce CAS, share demos, and set up meetings with clients.

G

Gauge Results

Track growth and engagement KPIs using the **100-20 Plan**.



Key Resource

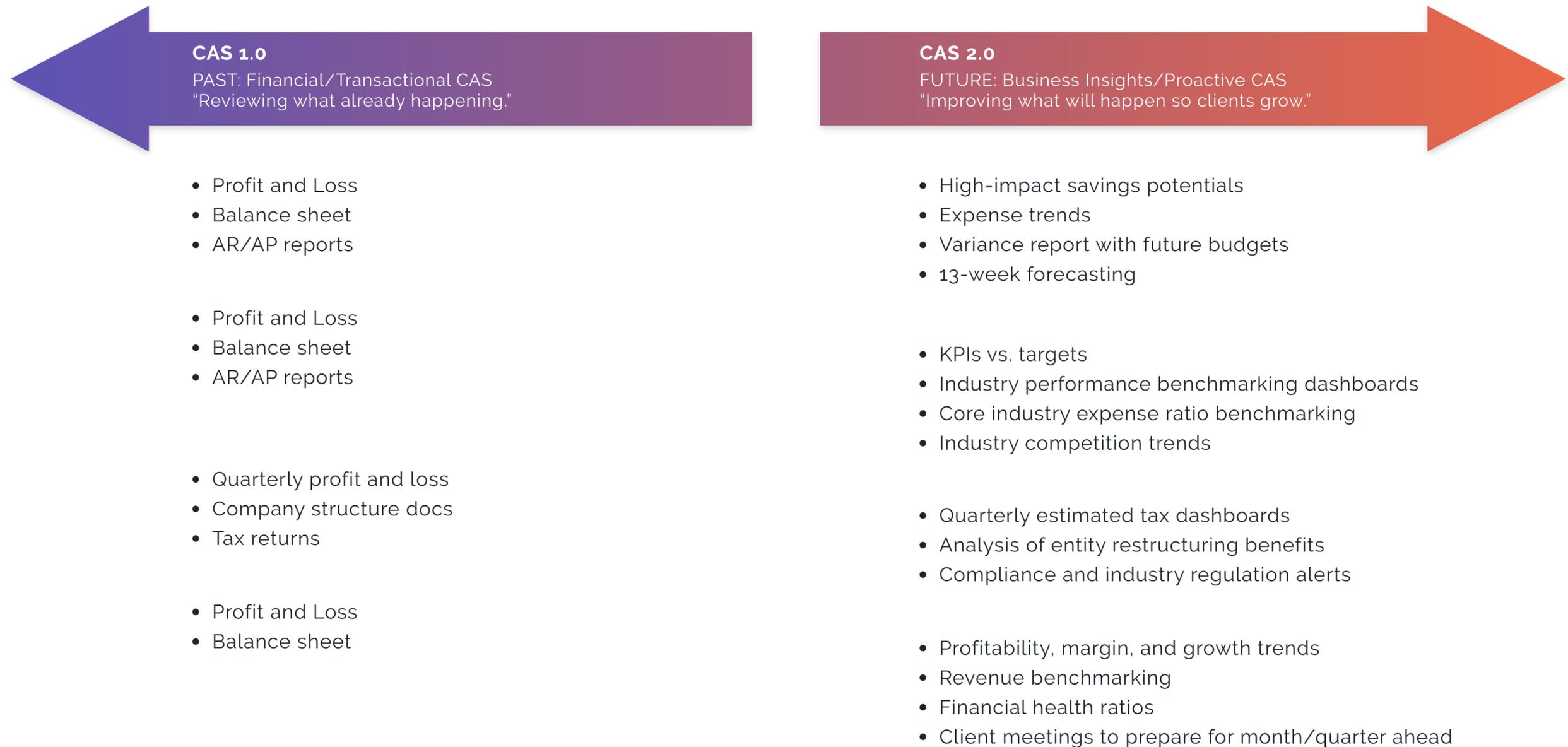
Share SPRING with your team to structure your CAS launch

Step 1

Scope of Services



Begin clarifying your **CAS (Client Advisory Services)** focus by applying the **CASH framework** to outline specific deliverables. These will bring the CAS 1.0 (past) and CAS 2.0 (future) services into the value streams you're delivering to your clients. Prioritize reporting capabilities that other firms cannot offer to create a moat and plan efficient processes to deliver CAS 2.0 services.



WORKSHEET PRINTOUT RESOURCE FIRM

CAS Service Planning Guide

Use the following to create an inventory of your CAS client deliverables. Consider if you are providing these monthly (recommended) or quarterly, automating with software (recommended) or producing manually, and the time required for reports. Total this time up to understand the time allocation per CAS client and plan staff accordingly. Remember: 1. Time can be reduced substantially with A.I. software - often by 90% per report and 2. CAS 2.0 items are preferred, more engaging, and useful to clients.

C

Cash and Control

CAS 2.0

- High-impact savings potentials
- Expense trends
- Variance reporting and recommendations
- 13-week cash flow forecasting

CAS 1.0

- Profit and Loss
- Balance sheet
- AR/AP reports

A

Analytics and Insights

CAS 2.0

- KPIs vs. targets
- Industry performance benchmarking dashboards
- Core industry expense ratio benchmarking
- Industry competition trends

CAS 1.0

- Profit and Loss
- Balance sheet
- AR/AP reports

S

Strategy and Tax

CAS 2.0

- Quarterly estimated tax dashboards
- Analysis of entity restructuring benefits
- Compliance and industry regulation alerts

CAS 1.0

- Quarterly profit and loss
- Company structure docs
- Tax returns

H

Health Metrics

CAS 2.0

- Profitability, margin, and growth trends
- Industry benchmarking
- Financial health ratios
- Client calls to prepare for month/quarter ahead

CAS 1.0

- Profit and Loss
- Balance sheet



Free Resource:

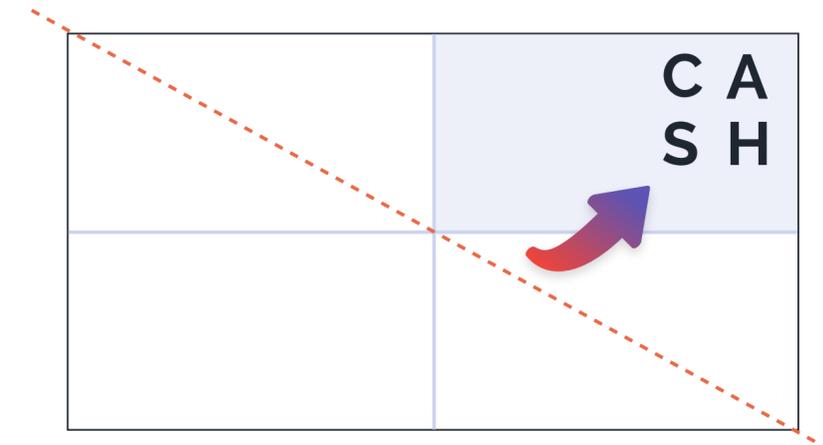
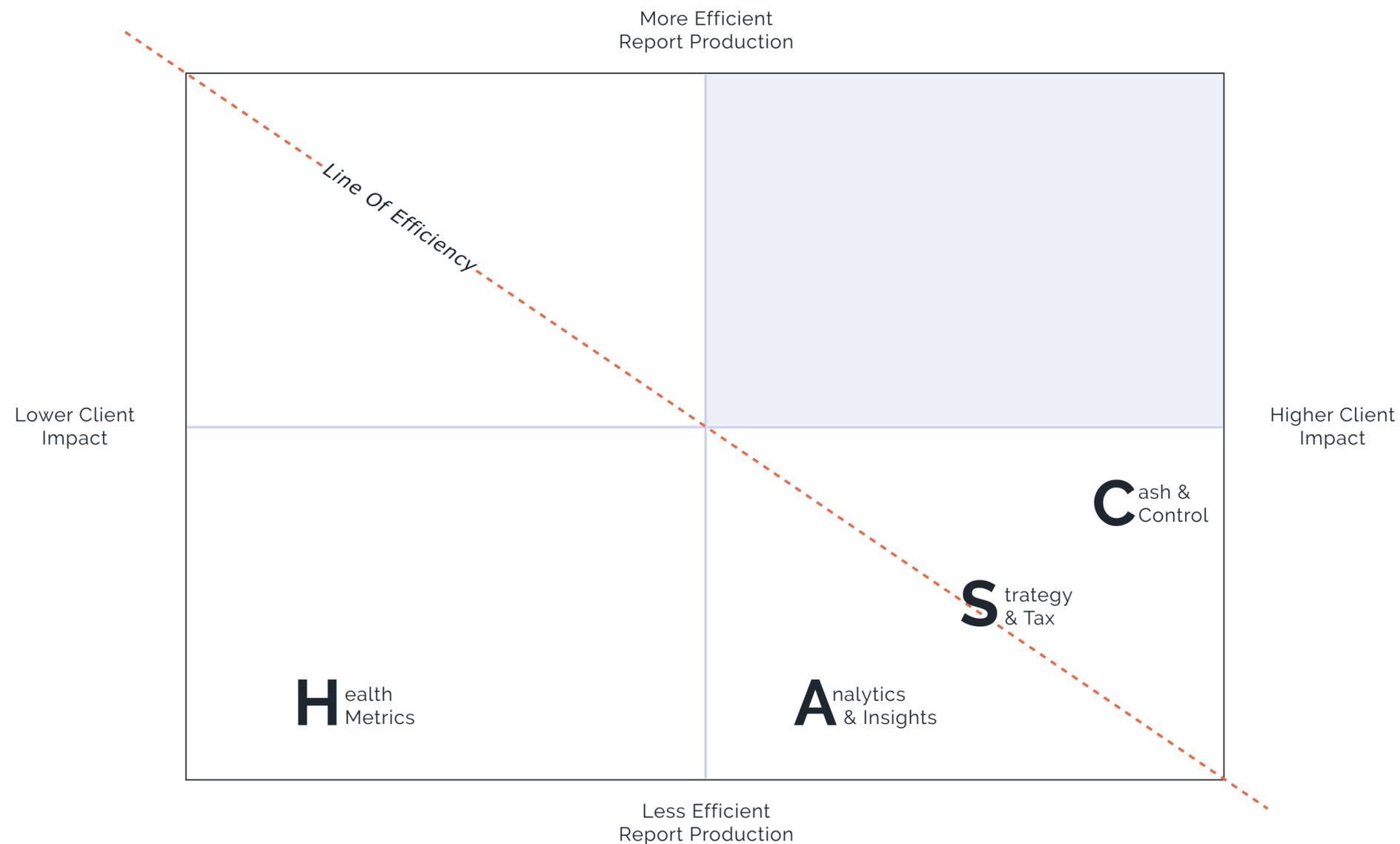
Get more information and an example of each deliverable + calculate the total staff time requirement on a free spreadsheet.

Step 1

Select Services That Scale

S P R I N G

Offering CAS successfully means selecting services that can be effectively scaled with automation and A.I. to deliver advisory that covers all clients comprehensively, without prohibitive staff costs and associated CAS pricing. Also consider establishing a moat with unique services to make your firm indispensable and reduce churn.



Automation and A.I.

A.I. and automation technology creates efficiency and reduces deliverable production time by 90%, making new services now profitable and possible.

Create recurring scalable packages

Use the format in the prior slides to create a list of scalable recurring services that help clients grow.

Create a moat

Make reporting services unique to your firm (hard to replicate by others) and automated for scaling using technology.

Step 2

Solving Staff Limitations



With tech, firms need just 2-3 CAS staff instead of 7-10—freeing up time, lowering costs, and making it easier to get home by 5pm. Less grind, more growth.

Hiring Path Limitation

Technology Path

Technology Benefits

Staff estimates

Assuming a total volume of 67 to 102 clients generating \$1.6-\$2.8MM CAS revenue

7 to 10 average CAS staff for ongoing services

2 to 3 CAS staff for ongoing services

Higher margins on CAS due to lower staff costs

Specialization

Typically CAS requires the CPA to have specific knowledge of each in industry

Limited to practice team member experience

Technology supports any industry without a research team

Sell CAS to any client in any industry

Advisory Growth

Advisory demos require upfront time commitments

2 to 8 hours to show first demo deliverables

15 minutes to showcase CAS benefits to clients

Convert higher percentage of clients with "CAS test drives"

Step 2

Staff Role Groups



Form a team with two groups. The first focuses on **Growth (sales, outreach, applying the “20% rule” to reach 9-month success)**. The second focuses on **Engagement (onboarding and delivery to manage the ongoing work)**. Consider the responsibilities, personality, time availability, and KPIs for each.

Client Journey

Staff Group 1

Practice Growth

Responsibilities

- Existing and new client outreach
- Produce and share demo CAS reports
- Meet with potential CAS clients to review

Staff personality

- Role favors outgoing staff members who enjoy meetings

KPIs

- Demo reports shared and viewed
- Meetings booked and held
- % of existing clients engaged in CAS or pending

Targets (100-20)

- Engage 20% of 100 existing clients in first 90 days
- Grow this 20% each month (starts as 1 new per week)
- Leads to industry range of 67-102 within 1 year

Staff Group 2

Engagement Management

Responsibilities

- Onboarding clients to CAS platforms
- Produce ongoing reports (after first demo)
- Meet monthly/quarterly to review CASH and set targets

Staff personality

- Role favors more staff members who enjoy financial analysis review, report production, and addressing client questions

KPIs

- Production time per report
- Client engagement (report view %, time, meetings per year)
- Recurring revenue
- CAS churn

Targets

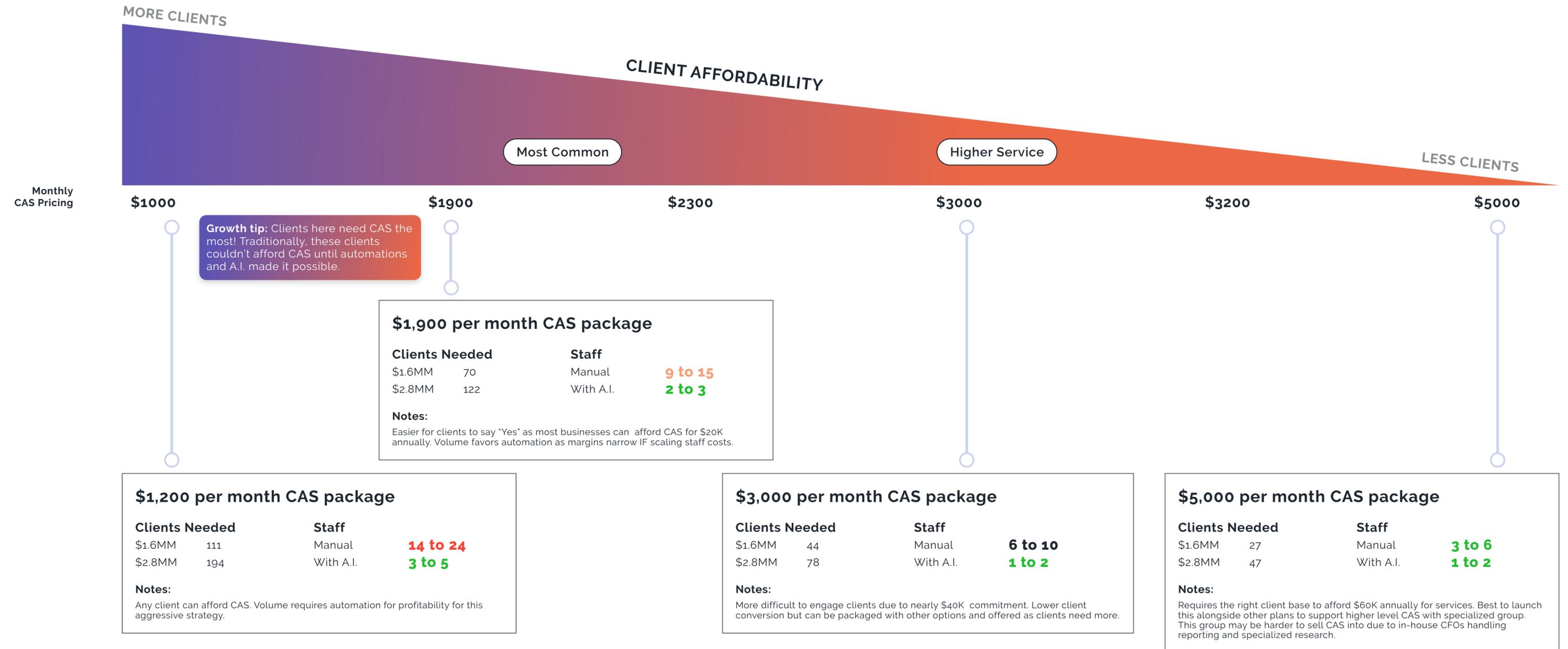
- Maintain average of 40+ reports delivered per month per staff.
- Maintain average of 40+ client meetings per month per staff

Step 3

Rates and Packages



Determine **market-aligned packages** that match client expectations and your preferred CAS strategy. First work back from successful CAS practice ranges while increasing profitability with automation. Consider under served market sectors by bringing CAS to clients that traditionally could not afford this service level.



Step 4

Integrate Systems



Selecting a system for CAS means filling the holes where tax software and other tools end. Your CAS management solution should provide BOTH sales tools and CAS delivery tools. CAS is a new concept to clients and they will understand it best when they see it. This means leveraging AI features to deliver fast demo reports, having email campaigns built-in, and offering new capabilities like valuations to measure CAS impact are critical.

Launching & Selling CAS

Supporting CAS practice sales and growth.

- White labeled client-accessible dashboards
- Clients upload for CAS kickoff
- CRM for tracking CAS sales process
- Automated email campaigns from firm's domain
- See client views to track engagement for followup
- Deliver free CAS demo reports to clients from their financial data
- High limits on client demos tied to financial to support top-of-funnel
- Demo report generation time of 15 minutes or less
- Company valuations for client demos
- Meeting booking directly from platform and email campaigns

CAS Engagement Management

Multiplying advisory output per staff member.

- AI tools to require minimal data like profit and loss instead of whole org data
- Start and track engagements on-platform
- AI to get industry benchmarks for growth metrics
- AI to get industry key expenses and related benchmarks for any industry
- AI to get industry trends and updates
- Report adjustment prior to sharing with clients
- Track CAS practice revenue on-platform
- Manage staff, offices, and branding for firm
- See client valuation growth over time to measure impact of CAS
- SOC 2 Type 2 to secure data

Step 5

Notify Clients



Share your upcoming service enhancements as a broadcast to clients. Position this as a **part of your service enhancement and commitment to helping key clients grow and succeed** and bundle with existing CAS 1.0 services. Your goal in this communication is to share that demos are coming soon and set meetings with clients to show them how to better grow with these new resources they will have available.

Best practice communication

- Short and sweet (150 words max)
- Share what's coming and why
- Call to action is look out for demo and let's have meeting



Track results (don't launch blindly)

- Measure open rate, responses, demos explored, meetings set
- Growth follows up with those that don't set meetings



Ideal roll-out

- Offer clients CAS demo to "test drive CAS" with report/client portal software
- 3+ email followup sequence 1 week apart
- Use easy CRM to track this across client pool

The image shows two overlapping screenshots of a CRM interface. The left screenshot, titled "Clients", displays a table of client data with columns for Client, Advisory Report, Share with Client, In Seat?, Engagement, and Recurrent Billing. The right screenshot, titled "Emails", shows a "Create New Email Broadcast" modal form with fields for Subject and Body, and a "Schedule Broadcast" button.

Client	Advisory Report	Share with Client	In Seat?	Engagement	Recurrent Billing
Lumora	Delivered · May 12	Shared · 2 contacts	Yes	Engagement Active · View	\$1800/yr
Company 2	Delivered · May 12	Shared · 2 contacts E. Smith viewed 1 day ago A. Andrews didn't view	Yes	Engagement Active · View	Not Available
Quantis	Delivered · May 12	Shared · 2 contacts	Yes	Engagement Active · View	Activate Billing
Nexora	Delivered · May 12	Shared · 3 contacts	8d left in trial · Give seat	No Engagement · Engage	
Veltrix	Delivered · May 7	Shared · 3 contacts	Trial expired · Give seat		

Step 6

Gauge Results



Start by engaging just 20% of existing clients and grow from there—leading to 67–102 CAS clients in a year with as few as two staff members assigned to CAS. With software automating 40+ reports and meetings per staff, firms scale faster, boost retention, and stay focused on what clients actually value.

Practice Growth



CAS Outreach

- Number and % of existing clients contacted about CAS
- (Software only) Demo reports created/viewed
- New clients contacted about CAS



CAS Meetings

- Number and % of contacts moved to meetings
- Number and % of contacts pending CAS engagement
- Number and % contacts engaged



Targets (100-20)

- Engage 20% of 100 existing clients in first 90 days
- Grow this 20% each month (starts as 1 new per week)
- Leads to industry range of 67-102 within 1 year

Growth tip:

Use a CRM built for accounting!

CAS CRMs can accept client uploads, run reports, share CAS trials, and start email campaigns designed to set meetings.

Engagement Management



Report Metrics

- What parts of the report do clients care about most
- How can we make those parts faster and better
- What reports are clients not looking at



Client Engagement

- Percentage that attended meetings
- Percentage viewing reports
- Recurring revenue and churn



Targets

- Automated: 40 reports + 40 meetings per staff
- Manual: 8 reports + 8 meetings per staff

Growth tip:

Leverage CAS A.I. software automation

Surpassing the benchmark report's upper end of 10 clients requires automation and A.I. to streamline reporting output.

Q&A

Resources:



www.fetchinsights.com/resources