

# Is your firm's CAS practice aligned with best practices?

## CPA.com CAS Firm Self-assessment Tool



## Introducing a tool to foster essential leadership conversations around CAS practice growth and success

### **Align your CAS practice with best practices**

CPA.com has partnered with Succession Institute to create a CAS firm self-assessment tool designed to help you align to CAS best practices. By using this innovative tool, you will get a snapshot of how key stakeholders assess the current health, direction, and processes of your firm's CAS practice.

Whether your CAS practice is in its infancy or in its growth stage, the CAS Firm Self-Assessment Tool looks at key areas and common practices to:

- Address best practices for pricing CAS services
- Assess practice growth paths
- Recognize operational hurdles that stand in the way of improved practice efficiency and success
- Identify key conversations with stakeholders to quickly impact your firm's trajectory for growth and profitability

### **How the Tool Works**

The tool generates a substantial report containing a description of your firm's practice, suggestions for alignment to best practices, and suggestions for resources to assist with practice development.

The tool covers areas such as:

- Assessment Sections
- Role of the Person Taking the Assessment
- Client Accounting Services Current Offering
- Client Accounting Services Future Offering
- Practice Leadership
- Governance and Strategy
- Client Management
- Accountability
- Scheduling and Work Flow
- Compensation
- Pricing and Profitability

Ideally, two key stakeholders, the CAS practice leader and a firm leader with CAS oversight responsibility will participate and complete an in-depth questionnaire to collect information about your CAS practice.

The tool looks at your vision for your CAS practice, operational hurdles, and opportunities to share resources. By having two participants, the tool can compare responses and identify gaps and inconsistencies that may create problems and be holding back the growth of your practice.

## Using the CAS Firm Self-Assessment tool is easy.



### Additional Resources

Access a variety of resource to further understand the value and potential impact of the Self-Assessment Tool.



**CAS Firm Self-Assessment Tool**  
[CAS Firm Self Assessment Tool | CPA.com](https://cpa.com/cas-firm-self-assessment)



**CAS Assessment Tool Webinar**  
Replay our introductory webinar with developers of the Self-Assessment Tool, Bill Reeb and Tommye Barie of the Succession Institute.  
[CAS Self-Assessment Tool Webinar](#)



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### Grow Your CAS practice

CPA.com guides and enables firms to build, transform and grow their Client Advisory Service (CAS) practices. We empower firms to be trusted advisors, meeting their client demands of today and tomorrow. We support your firm's profitable CAS practice growth no matter where you are in your journey with expert guidance on CAS strategy & execution, research on key emerging trends, in-depth skills and practice development, practice assessment and benchmarking, and best-in class technology solutions.

To learn more about the CAS Self-Assessment Tool or CPA.com, please contact our team at [inquire@hq.cpa.com](mailto:inquire@hq.cpa.com) or by calling 1.855.855.5CPA.

## Contact us today!

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