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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

The CPA.com CAS Firm Self-Assessment tool will give you a snapshot of how key stakeholders assess the current health, direction and processes of your firm's client advisory services (CAS) practice and identify areas of focus based on best practices. This innovative tool will guide practice leaders through a series of considerations related to key pillars of a successful 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 will generate a comprehensive report providing an overview of your CAS practice, including insights into current strengths and gaps that may require additional focus, and offer additional resources to help optimize your practice and position for future growth.

The tool covers areas such as:

- Assessment sections
- Role of the person taking the assessment
- Client advisory services current offering
- Client advisory services future offering
- Practice leadership
- Governance and strategy
- Client management
- Accountability
- Scheduling and workflow
- Compensation
- Pricing and profitability

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

Based on your firm's vision for your CAS practice, the tool will help you identify 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 simple.

Internal decision to assess CAS practice

Select two participants to complete the self-assessment

Sign up for access at CPA.com/cas-firm-self-assessment

Enter email addresses for selected firm respondents

Participants receive survey

Automated process through Qualtrics hosted by CPA.com

Participant #1 completes CAS firm self-assessment survey

Limited report available with standard best practices and resources

Participant #2 completes CAS firm self-assessment survey

Full report available with level of agreement recommendations and best practices

Additional resources

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

CAS Firm Self-Assessment Tool

Get a snapshot of how key stakeholders assess the current health, direction and processes of your firm's CAS practice.

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CAS Assessment Tool Webinar

Replay an introductory webinar with developers of the Self-Assessment Tool, Bill Reeb and Tommye Barie of the Succession Institute.

CAS Self-Assessment Tool Webinar

CAS Professional Services

Achieve your firm's vision for your CAS practice with our expert-led coaching, consulting, workshops and more.

CAS 2.0™ | CPA.com

Grow your CAS practice

CPA.com guides and enables firms to build, transform and grow their client advisory service (CAS) practices to deliver the higher value services and insights their clients increasingly need. We support your firm's profitable CAS practice growth no matter where you are in your journey with expert guidance on CAS strategy and execution, research on key emerging trends, in-depth skills and practice development, practice assessment and benchmarking, and best-in-class technology solutions.

Contact us today

to find out more about the CAS Firm Self-Assessment Tool or CPA.com, email us at inquire@hq.cpa.com or visit us at **CPA.com/CAS**.

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