

# The 2024 CAS Benchmark Survey: Put it to work for your practice

CPA.com  
2024 CAS Benchmark Survey



## Measure, compare and refine to make your practice the best it can be

How have client advisory services (CAS) practices evolved over the past two years – and where are they headed in the future? How does your firm’s CAS practice stack up with others across the country? What’s working for your peers – and what’s not?

Knowing the answers to questions like these can help your firm refine its approach to CAS, putting it on the path to continued, sustainable growth.

That’s why CPA.com and AICPA PCPS developed the CAS Benchmark Survey. The survey aims to shed light on the current state of CAS and outsourced accounting services, gathering detailed insights on:

- Structure and services offered
- Practice revenue
- Projected revenue and growth
- Typical monthly fee and largest client fee
- # of total clients, # of new clients, client turnover rate
- CAS margin (reported as CAS revenue less staff costs, divided by CAS revenue)
- # of staff FTE (and % outsourced/offshored)
- Industries supported
- Average client revenue
- Net client fees per professional
- Clients per FTE

### Why should your firm participate?

By participating in the survey, your firm has access to key benchmarking data to help shape your CAS strategy. Previous participants report that they regularly use survey benchmarks to start conversations with firm leadership and optimize their practices. Your firm can:

- Benchmark its CAS practice against peers
- Identify KPIs for measuring practice growth
- Encourage deeper leadership buy-in and investment
- Identify specific opportunities to optimize practice performance
- Better inform decision making on issues such as staffing, training, technology, and pricing

Your participation is also critically important to the entire profession. With robust CAS survey data, firm leaders can better understand exactly how CAS is evolving and respond accordingly. Survey insights inform thought leadership, programming, resources, and tools developed by AICPA, CPA.com and others across the profession to create more opportunities and support firms that are committed to a higher level of client service through CAS.

Call 855.855.5CPA or learn more at [cpa.com/cas-benchmark-survey](https://cpa.com/cas-benchmark-survey)

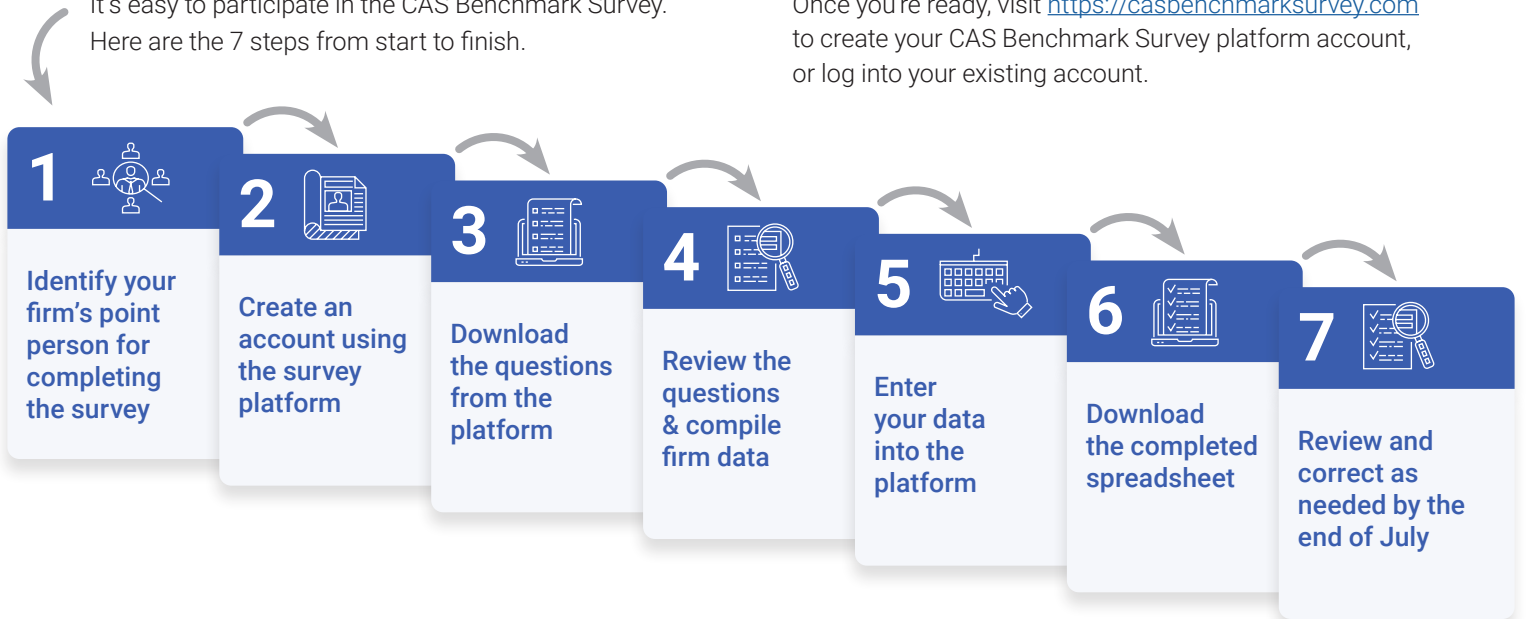
This survey is open to CAS practitioners and leaders offering accounting and advisory services in the U.S., regardless of firm size.

**Getting started is easy. Here's how.**

It's easy to participate in the CAS Benchmark Survey. Here are the 7 steps from start to finish.

**Identify your point person and get started!**

Once you're ready, visit <https://casbenchmarksurvey.com> to create your CAS Benchmark Survey platform account, or log into your existing account.



Got questions? Need help?  
We're here for for you.

For help with anything regarding the CAS Benchmark Survey, from creating a new account to using the questionnaire, we're standing by. Just email us at [assessments@hq.cpa.com](mailto:assessments@hq.cpa.com) to start a conversation.