

Differentiation, Defining Benefits, Value Proposition Development

A significant barrier to sales is clients' misunderstanding of the value of client advisory services or confusing it with basic bookkeeping. To overcome this, you need to clearly articulate the unique benefits and value propositions of your CAS to differentiate them in the minds of your prospects. Emphasize selling the outcomes rather than just the services (e.g., Orthodontists selling the smile versus selling the braces, or accounting and finance professionals selling decision-making insights rather than manual work). Below is a process you can follow to develop or refine your firm's CAS value proposition.

STEPS TO DEVELOP OR REFINE A STRONG VALUE PROPOSITION:

Identify your target audience

Understand who your clients are (e.g., small business owners, startups, established corporations).	Identify their pain points and needs.
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Create a value proposition template:

Use the template: "We help [target audience] do [desired outcome] by [service/solution]."	Example: "We help small business owners increase profitability by providing strategic financial insights and actionable plans."
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Understand their pain points

Common issues could include financial planning, growth strategies, compliance challenges, or operational efficiencies.	Gather data through surveys, interviews, and market research.
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Communicate the value:

Use clear, jargon-free language.	Focus on benefits over features.
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Example

"Our advisory services go beyond numbers to provide insights that drive business success."

Define your unique solution

Articulate how your CAS addresses these pain points uniquely.	If your firm has focused on a specific niche or industry, it is beneficial to highlight your expertise in that area.	Emphasize outcomes, not just services.
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Example

Before: "We provide financial analysis and forecasting."	After: "We help small businesses achieve sustainable growth by providing in-depth financial analysis and accurate forecasting."
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Example

Target Audience:	Pain Point:	Value Proposition:
Small to medium-sized businesses	Struggling with financial planning and growth strategies	"We help small business owners drive profitability and growth by offering strategic financial planning and actionable business insights."

CONSIDERATIONS FOR BUILDING
A CAS BRAND INTERNALLY

It’s important to establish a strong internal brand for your client advisory services (CAS) that aligns with your overall company brand and culture. Building a robust internal brand for your CAS involves several key steps to ensure alignment with your overall company values and effective internal engagement.

STEPS TO BUILD AN INTERNAL CAS BRAND

Align with overall brand	
Ensure that the CAS brand reflects the core values, mission, and vision of the parent company.	Use consistent branding elements (logos, color schemes, messaging).
Engage internal stakeholders	
Educate firm staff about the CAS offerings and their value.	Create internal ambassadors by involving staff in brand development.
Develop internal communication strategies	
Regularly share success stories and client testimonials.	Use internal newsletters, intranets, and meetings to keep everyone informed and engaged.
Training and development	
Provide training to staff to understand and communicate the value of CAS.	Equip sales and customer service teams with the tools and knowledge to sell CAS effectively (this includes developing items like one pagers, sell decks, and more). Depending on the size or structure of your firm, the sales team may consist of leaders and managers selling the services, rather than a dedicated sales professional.
Incentivize advocacy	
Encourage staff to advocate for CAS by offering incentives and recognition for referrals and successful engagements.	

CHALLENGES WITH
MARKETING A CAS PRACTICE

Marketing a client advisory services (CAS) practice involves unique challenges that require strategic solutions. This section outlines common challenges and provides actionable solutions to effectively address them.

COMMON CHALLENGES AND SOLUTIONS

Client education	
Challenge: Clients often don’t understand the difference between CAS and traditional bookkeeping/tax/accounting services.	Solution: Create educational content (blogs, webinars, whitepapers) that clearly explains the benefits and differences of CAS. Use case studies to demonstrate real-world outcomes.
Perceived value vs. cost	
Challenge: Clients may see CAS as an unnecessary expense.	Solution: Highlight ROI and long-term benefits. Provide examples of cost savings and revenue growth resulting from your advisory services.
Trust and credibility	
Challenge: Building trust with clients who may be skeptical of advisory services.	Solution: Showcase testimonials, case studies, and industry certifications. Offer a trial period or satisfaction guarantee to reduce perceived risk.
Completion	
Challenge: Standing out in a crowded market.	Solution: Emphasize your unique value proposition. Highlight specific industry expertise, innovative tools, or proprietary methodologies that set you apart.
Integration with existing services	
Challenge: Seamlessly integrating CAS with other services.	Solution: Ensure clear communication and a cohesive client experience. Demonstrate how CAS complements and enhances other services.