

CAS glossary of terms

This CAS glossary will help you define key terms, concepts, and practices related to your CAS journey. It is aligned to the best practices shared in CPA.com’s CAS 2.0® Practice Transformation Coaching, and each section defines a phase of that journey. It is our goal that by offering this standardized terminology and offering insights into these best practices, this CAS glossary will help ensure consistency, accuracy, and efficiency in your service delivery.

Client advisory services (CAS), as defined by AICPA and CPA.com, is a firm practice area designed to help clients outsource their accounting and finance needs across a spectrum of financial, accounting and advisory related services. CAS provides value to clients and deepens the trusted advisor relationship, leaving clients free to focus resources on delivering their core value proposition to their customers.

CAS offerings are enabled by technology and processes that deliver timely data and deeper insights into clients’ businesses. CAS ranges from compliance work and normal operational services to regularly scheduled advisory discussions supported by financial & non-financial data analytics. Service delivery through industry specific KPIs is fundamental to the success and differentiation of this service in the accounting profession.



Firm strategy and governance	
Business insights CAS	The actionable intelligence and strategic recommendations derived from analyzing a client's financial and operational data that enables firms to help clients navigate complex business environments and make strategic decisions with confidence.
CAS 2.0®	The next iteration of client advisory services (CAS) practice, CAS 2.0® encourages firms to approach the service line holistically and scale to higher-value advisory engagements by focusing on four key pillars: leadership alignment, practice development, technology integration, and operational excellence.
CAS 2.0® strategy and framework pillars	<i>CAS strategy & governance pillar</i> - Considerations for practice structure, leadership, accountability and management that inform CAS as part of the firm strategy.
	<i>CAS practice development pillar</i> - Decisions for practice management, including defining services, strategies for pricing, staffing and client management, and marketing and sales.
	<i>CAS technology solutions pillar</i> - Determinations regarding CAS technology innovation, including automation and AI, tech stack design, and implementation expertise.
	<i>CAS operational excellence pillar</i> - Planned standardization and improvement in process and methodology, including client management, staff roles and responsibilities, staff upskilling, and process documentation.
CFO finance	Comprehensive financial management and strategic advisory based on financial data provided to clients.
Financial CAS	Cloud-based financial services, providing monthly financial reporting and typical accounting services with monthly controller-level oversight, ideally delivered through a standardized dashboard of financial information.
Transactional accounting	The routine, day-to-day accounting tasks that involve recording and managing financial transactions.
Trusted advisor business insights	Expert guidance and strategic advice to clients, to make informed decisions and achieve their business goals.

CAS vision definitions	
Advisory services	A broad range of strategic and consultative services provided by firms across the CAS spectrum to help clients achieve their business goals.
Bookkeeping	The systematic recording, organizing, and tracking of a company's financial transactions.
CAS business plan	A plan that articulates the strategy and decisions you are making for your CAS practice.
CAS champion	A professional who leads and advocates for the development and launch of Client Advisory Services (CAS) within an accounting firm.

CAS vision definitions	
CAS margins	The profitability of CAS practices calculated by taking the CAS revenue, subtracting the staff costs, and then dividing the difference by the CAS revenue.
CAS metrics	Quantitative measures used to evaluate the performance and effectiveness of Client Advisory Services (CAS) practices. These metrics typically include data on practice structure, services offered, revenue, staffing, and technology utilization.
CAS mission statement	An outline of the strategic goals and value propositions of a firm's Client Advisory Services (CAS) practice. It serves as a guiding document that communicates the firm's commitment to delivering high-quality advisory services and the specific benefits clients can expect.
CAS spectrum of services	The various levels of CAS services starting at transactional-based reporting—or financial CAS—and progressing toward insights-based advisory-level services—or business insights CAS.
CAS strategic plan	A comprehensive roadmap that outlines the long-term goals, strategies, and actions for developing and enhancing a firm's Client Advisory Services (CAS) practice. It serves as a guide for making decisions about client engagement, talent acquisition, technology investments, and service offerings.
CAS vision statement	A forward-looking statement that defines the long-term goals and aspirations of a firm's Client Advisory Services (CAS) practice. It outlines the desired future state and strategic direction, guiding the firm's efforts to deliver exceptional advisory services and achieve sustained growth.
Client industry	The specific sectors or fields in which a firm's clients operate.
Client niche	Clients defined by specific industries or by type of company, e.g. small startups or mid-sized service providers.
Client verticals	The strategy of building specialized processes, tech stacks, and standardized reports and dashboards around specific industries. While client niches can also refer to types of companies, verticals specifically refers to specific industries, e.g. construction.
Culling of clients	The process of evaluating and selectively discontinuing relationships with clients who are not aligned with a firm's strategic goals or who may be unprofitable.
Financial metrics	Key performance indicators (KPIs) used to measure the success and efficiency of CAS services that help firms understand their financial health and identify areas for improvement.
Financial operations	The comprehensive management of a client's financial activities.
Fractional/outsourced CFO	High-level financial expertise and strategic guidance provided to businesses on a part-time or contract basis.
Growth and expansion planning	Strategic initiatives to scale and enhance CAS services, including defining strategy and metrics, standardizing processes and tech, business development planning, and focusing on specialization.
Lead to service delivery	Management of the entire client engagement process, from initial lead generation to the delivery of advisory services, using integrated tools and workflows to convert potential clients into satisfied customers.

CAS vision definitions	
Non-financial metrics	Essential indicators that provide insights into various aspects of a business's operations beyond just financial performance and help in understanding the overall health and efficiency of a business. These can include metrics like customer satisfaction, employee engagement, and operational efficiency.
Outsourced accounting	The practice of delegating accounting functions to an external service provider.
Outsourced/fractional CFO	High-level financial expertise and strategic guidance provided to businesses on a part-time or contract basis.
Statistical tracking and reporting	The systematic collection, analysis, and presentation of data to monitor performance and support decision-making.
SWOT analysis	An analysis of your CAS practice that looks at your strengths, weaknesses, opportunities, and threats.
Vertical specific solutions	Tailored advisory services and technology solutions designed to meet the unique needs and challenges of specific industries

Staffing and Ideal Client Profile	
Accounting managers	Managers who oversee the delivery of Client Advisory Services, ensuring that financial and advisory services meet client needs and firm standards. They play a crucial role in managing client relationships, supervising staff, and implementing strategic initiative.
CAS client levels	A way to categorize clients based on the complexity and scope of services they require from a firm's Client Advisory Services (CAS) practice. These levels help firms tailor their advisory services to meet the specific needs and value of each client.
CAS client scorecard	A tool used to evaluate and monitor the performance and satisfaction of clients within a firm's Client Advisory Services (CAS) practice. It helps firms track key metrics and insights to enhance client relationships and service delivery.
CAS competencies	A range of skills and knowledge areas essential for delivering high-quality advisory services. It can include areas like strategic insight, financial acumen, tech proficiency, client relationship management, and operational efficiency.
CAS soft skills	The interpersonal and communication skills essential for professionals in Client Advisory Services (CAS). These skills include effective communication, problem-solving, empathy, and the ability to build strong client relationships.
CAS technical skills	The specialized knowledge and skills required to effectively deliver Client Advisory Services (CAS). These skills include proficiency in accounting software, data analysis, financial reporting, and the use of advanced technologies like cloud computing and AI.
CFO level expertise	The advanced financial and strategic skills that a Chief Financial Officer (CFO) brings to an organization, like strategic financial planning, financial analysis and reporting, risk management, budgeting and forecasting, and operational efficiency.
Cross training	The practice of training staff members in multiple areas of expertise within the CAS practice.

Staffing and Ideal Client Profile	
Dedicated staff	Team members who are fully focused on providing CAS services rather than splitting their time between CAS and other practice areas.
Formal written performance expectations	Clearly documented standards and goals that outline the expected performance levels for staff members including specific metrics, targets, and behaviors.
Full-time equivalent (FTE)	A unit that is used to measure the number of full-time hours worked by all employees, converted into the equivalent number of full-time employees.
Incentive structure	The system of rewards and recognition designed to motivate and align the performance of staff with the firm's strategic goals.
Human capital	The skills, knowledge, and expertise of the professionals within a firm's Client Advisory Services (CAS) practice.
Ideal client profile	A detailed description of the type of client that aligns best with a firm's CAS practice.
Mature staffing model	An advanced framework for staffing Client Advisory Services (CAS) that ensures the right mix of skills and roles to deliver high-quality advisory services. It involves strategic hiring, continuous training, and aligning staff capabilities with the evolving needs of clients.
Offboarding	The process of formally ending a client's relationship with a firm, ensuring a smooth transition and proper documentation. It involves finalizing outstanding tasks, transferring knowledge, and maintaining professionalism to leave a positive impression.
Offshoring	The practice of outsourcing certain business processes or services to professionals in other countries.
Onboarding	The process of integrating new clients into a firm's Client Advisory Services (CAS) practice. It involves setting up systems, understanding client needs, and establishing communication protocols to ensure a smooth and effective start to the advisory relationship.
Outsourcing	The practice of delegating certain business processes or services to external providers.
Partner in charge of accounting services	A senior professional responsible for overseeing and leading the Client Advisory Services (CAS) practice within a firm. They ensure the delivery of high-quality advisory services, manage client relationships, and drive strategic initiatives to grow the CAS practice.
Right-fit clients	Clients whose needs, values, and business goals align well with the Ideal Client Profile defined by the CPA firm, ensuring a mutually beneficial and productive relationship.
Roles and responsibilities matrix	A tool used to clearly outline the specific duties and accountabilities of each team member within a Client Advisory Services (CAS) practice.
Skills testing	The evaluation of the technical and soft skills required for professionals in Client Advisory Services (CAS).
Tech skills self-assessment	A tool used by professionals to evaluate their technical competencies related to Client Advisory Services (CAS). It helps identify strengths and areas for improvement in using technology to deliver high-quality advisory services.
Training	The structured programs and workshops designed to enhance the skills and knowledge of CAS professionals.

Staffing and Ideal Client Profile	
Transaction specialists	Professionals who manage and oversee transactional processes within a firm's Client Advisory Services (CAS) practice. They handle tasks such as accounts payable, accounts receivable, and other financial transactions to ensure accuracy and efficiency.
Upskilling	Enhancing the skills and capabilities of your team to better meet the evolving needs of clients, including training on new technologies, improving advisory skills, and staying updated with industry trends.
Virtual CFO	A financial expert who provides high-level financial management and strategic advice to businesses on a part-time or remote basis. They help with budgeting, forecasting, financial planning, and other CFO duties without the need for a full-time, in-house CFO.
Virtual controller	A professional who provides remote financial management services, including overseeing accounting operations, financial reporting, and budgeting. They help businesses maintain accurate financial records and ensure compliance without the need for an on-site controller.

Technology and SOPs	
Appendix of services	A detailed list of the various services offered under a CAS engagement.
Billpay software	Software that automates the process of managing and paying bills, providing features like paperless transactions, streamlined approvals, and real-time visibility into cash flow.
Budget and forecasting software	Software that provides advanced planning capabilities, enabling firms to create detailed financial models, perform scenario analysis, and generate accurate forecasts to guide strategic decision-making.
CAS chart of accounts	A structured list of all the accounts used by a business to record financial transactions, tailored specifically for Client Advisory Services (CAS). It helps in organizing and standardizing financial data to facilitate accurate reporting and advisory services.
Client collaboration	Leveraging cloud-based tools and platforms to facilitate real-time communication, data sharing, and joint decision-making between firms and their clients.
Cloud accounting	Cloud-based technologies that provide real-time financial data access, streamline accounting processes, and enhance collaboration between firms and their clients.
CRM	Software that integrates client relationship management with advisory services, enabling firms to streamline client interactions, track engagements, and enhance service delivery through centralized data and automated workflows.
Dashboards and reporting	Dashboards that provide real-time, visual representations of key financial and operational metrics, enabling firms to deliver actionable insights and strategic recommendations to their clients.
Data mining for analysis	Extracting and analyzing large sets of data to uncover patterns, trends, and insights that can inform business decisions.

Technology and SOPs	
Document management	Using digital tools to organize, store, and manage client documents securely, ensuring easy access and efficient collaboration.
ERP technology	Integrated software systems that manage and automate core business processes, such as accounting, procurement, project management, and supply chain operations.
Expense management	The processes and systems used to track, control, and optimize business expenses.
Gap analysis	Analysis that identifies discrepancies between a client's current financial practices and their desired state, helping firms pinpoint areas for improvement and develop targeted strategies to bridge these gaps.
General ledger software	General ledger software centralizes and automates the recording of all financial transactions, providing a comprehensive and accurate financial overview.
Generative AI	A type of artificial intelligence that creates new content, such as text, images, or videos, in response to prompts.
Lead to service delivery	Management of the entire client engagement process, from initial lead generation to the delivery of advisory services, using integrated tools and workflows.
Master service agreement (MSA)	An agreement which outlines the terms and conditions governing the overall relationship between a firm and its client, covering multiple advisory services engagements.
Niche specific software	Software that is tailored to meet the unique needs of specific industries or sectors, providing specialized functionalities and workflows that enhance efficiency and service delivery for firms focusing on particular market segments.
Payroll and HCM software	Software that automates payroll processing and manages employee- (human capital) related data, enhancing efficiency and compliance.
Post- accounting business insights	Providing clients with strategic, advisory-level insights beyond traditional accounting task.
Pre-accounting	Automating the collection and categorization of financial data before it enters the accounting system, streamlining processes like expense tracking and receipt management.
Process playbook	A document that outlines standardized procedures and best practices for delivering Client Advisory Services, ensuring consistency, efficiency, and quality across engagements.
Spend management	The ability to view, control, and proactively manage a business's cash flow in real-time and in one centralized location, providing actionable insights and approachable advisory services to key financial decision-makers.
Standardized operating procedures (SOPs)	Standardized procedures for functions like onboarding, ongoing service delivery, and offboarding.

Technology and SOPs	
Standardized workflows	A way to ensure consistent, efficient, and scalable service delivery by embedding best practices and processes into the firm's operations.
Statement of work (SOW)	An outline of the specific services to be provided, the scope of work, and the terms and conditions agreed upon by the client and the firm.
Tech stack	The combination of software and technology tools used to deliver CAS efficiently and effectively. It generally includes internal and external facing tools like core accounting software, client relationship management systems, data analytics tools, workflow automation, and industry specific solutions.
Technology gap matrix	A matrix in Client Advisory Services (CAS) identifies the differences between the current technology capabilities of a firm and the optimal technology needed to support its CAS offering.
Vendor scorecard	A tool used to evaluate and monitor the performance of vendors based on key metrics and criteria.
Workflow	The structured sequence of processes and tasks that ensure efficient and consistent service delivery.

Client assessments	
Assessment deliverables	The concrete results provided at the end of an evaluation process, such as detailed reports, recommendations, and action plans that address the client's accounting needs and opportunities for improvement.
Basic client needs assessment	The process for identifying and understanding the fundamental requirements and expectations of a client, including their financial processes and current accounting practices. Similar to a Light Assessment.
CAS Client Assessment	A structured process of evaluating all relevant aspects of the client's accounting operations, including processes, staffing, and future goals, into a report of recommendations for the CAS practice and the client.
Client assessment	A process used to evaluate a client's needs, financial health, and business goals within the context of Client Advisory Services (CAS). It helps firms tailor their advisory services to provide the most relevant and impactful support to each client.
Chargable CAS assessment	A detailed evaluation of a client's accounting needs and processes, for which the CPA firm charges a fee. This assessment aims to produce a detailed report of recommendations with opportunities for service improvements and potential areas for additional billable services.
Client assessment presentation	A structured overview of the completed assessment provided to share results about the client's financial health, needs, and goals, often including detailed analysis and recommendations for improvement.
Client discovery checklist	A list of questions and information-gathering steps used to understand a new client's financial situation, business operations, and goals.
Discovery	A function of the sales/business development team completed during the sales process that helps scope the CAS engagement by asking questions of prospective client. It is completed during the sales process.

Client assessments	
Implementations	The process of setting up and integrating CAS solutions within a firm to enhance service delivery and client satisfaction. This step occurs after onboarding.
Light assessment	A preliminary evaluation that provides a high-level overview of a client's financial situation, identifying key areas of concern and opportunities for improvement without delving into extensive detail. Similar to a Basic Needs Assessment.
New client onboarding	The structured process of integrating a new client into the firm's CAS practice.
Non-chargeable assessment	See "basic needs assessment" or "light assessment."
Robust CAS assessment	A comprehensive evaluation of a client's financial processes, systems, and data to identify areas for improvement, ensure compliance, and enhance overall efficiency. This assessment typically includes analyzing bookkeeping, payroll, financial reporting, and technology integration, and is typically a chargeable engagement.
Scoping assessment	See "Light assessment."
Stand-alone CAS client assessment	An evaluation of a client's accounting and financial processes, aimed at identifying inefficiencies and opportunities for improvement. This assessment provides a detailed analysis without integrating it into broader service offerings, focusing solely on understanding the client's specific accounting situation.
Standardized onboarding process	A standard set of steps that ensures that new clients are integrated into the firm's services in a consistent, organized, and timely manner.

Pricing and packaging	
Annual project clients	Clients who engage with the firm for specific, time-bound projects rather than ongoing, recurring services. These projects typically have a defined scope, timeline, and deliverables.
Annual services	Services that are specific, time-bound projects rather than ongoing, recurring services. These projects typically have a defined scope, timeline, and deliverables.
Billing (vs. pricing)	The process of invoicing and charging clients for the services rendered.
Bundled services	The practice of combining multiple advisory and accounting services into a single, comprehensive package.
Business process outsourcing (BPO)	A process of delegating the back-office processes or non-core business functions to a third-party service provider. Also called Outsourced Accounting or Outsourced Accounting and Finance Function.
CAS margins	The profitability of CAS practices calculated by taking the CAS revenue, subtracting the staff costs, and then dividing the result by the CAS revenue.

Pricing and packaging	
Cost calculator	A tool used to estimate the costs associated with providing CAS to clients that then helps firms determine the pricing for their services. The calculator considers factors like time and resources, staffing costs, tech and tools, and profit margins.
Deliverables	Specific outputs and services provided to clients designed to meet the clients' financial and strategic needs.
Flat rate/fixed fee billing	Rates set per project.
Forecasting	Predicting future financial outcomes based on historical data, current trends, and expected future events to help businesses plan and make informed decisions.
FP&A (financial planning and analysis)	Strategic insights and guidance from accounting, finance, and operations that help businesses plan for the future.
Fractional/outsourced CFO	High-level financial expertise and strategic guidance provided to businesses as part of a CAS engagement.
Hourly billing	Charging clients based on the hours spent on their projects at the rate of the person doing the work.
Hybrid pricing	A mix and match of different pricing models based on the project and the client.
Job estimating worksheet	A tool used to estimate the costs and resources required for a specific project or service that helps firms plan and price their services accurately.
Monthly services	Ongoing, consistent support to clients to help them manage their financial operations and make informed business decisions.
Price (vs. value)	The specific fee or rate charged for CAS, which can be based on various pricing models such as hourly billing, fixed fees, or value-based pricing.
Pricing (vs. billing)	The strategy and methodology used to set the fee for services to a client. It involves determining how much to charge clients based on factors like the value provided, market rates, and the firm's goals.
Pricing calculator	A tool used to determine the appropriate pricing for CAS offerings and helps firms estimate the fees and set prices that reflect the value of the services provided.
Pricing strategy	A comprehensive approach that aligns the firm's vision, client focus, team capabilities, technology, and value proposition to deliver and price tailored and valuable advisory services.
Productization	The process of standardizing and packaging advisory services into repeatable, scalable offerings that can be consistently delivered to clients.
Productization workbook	A structured guide that helps firms standardize and package their advisory services into repeatable, scalable offerings.
Project services	Specialized, time-bound engagements that address specific client needs and are distinct from ongoing, recurring services.
Recurring functions	The ongoing, repetitive tasks that are performed regularly to maintain the financial health and operations of a client's business.

Pricing and packaging	
Recurring revenue	The consistent and predictable income generated from ongoing services provided to clients that typically involves charging clients on a regular basis for continuous services.
Scope creep	The unplanned expansion of a project's scope beyond its initial parameters, often leading to increased costs and delays.
Single services	Individual, standalone services offered to clients, rather than bundled or comprehensive packages that are typically specific and targeted.
Special projects	Unique, non-recurring engagements that address specific client needs outside the scope of regular ongoing service delivery.
Standardized chart of accounts	A structured framework that organizes financial transactions into consistent categories, facilitating accurate reporting and analysis.
Subscription pricing	A recurring revenue model where clients pay a regular fee for continuous access to advisory services, fostering long-term relationships with predictable fee structures. Addition tasks are charged at a predetermined rate.
Subscription services	A pricing model where clients pay a regular, recurring fee (monthly, quarterly, or annually) for a bundle of advisory and accounting services.
Times and materials billing	Charging clients based on the actual time spent on their project and the materials used in a method that combines hourly billing for labor with the cost of materials.
Value (vs. price)	The perceived benefits and results that clients gain from the services, such as improved financial performance, strategic insights, and enhanced decision-making.
Value pricing (value billing)	A pricing strategy where fees are based on the perceived value of the services provided to the client, rather than the time spent delivering those services.

Marketing, sales and metrics	
Buyer persona (defined client persona)	Semi-fictional representations of an ideal customer, used to understand potential client motivations and behaviors.
CAS margins	The profitability of CAS practices calculated by taking the CAS revenue, subtracting the staff costs, and then dividing the difference by the CAS revenue.
CAS marketing	The promotion of Client Accounting Services by highlighting the benefits of streamlined financial management, customized solutions, and expert support to attract and retain business clients.
CAS marketing needs checklist	A tool used to define marketing needs before engaging with a marketing team.
CAS marketing toolkit	A set of tools and resources developed to help CAS practices create a consistent marketing message and improve their marketing efforts.
CAS performance metrics	Metrics used to measure the success and effectiveness of CAS services, including timeliness of due dates, revenue per client, and NPS score.

Marketing, sales and metrics	
CAS performance metrics matrix	A tool used to track and report CAS performance metrics.
CAS practice transformation journey	The process of evolving a CAS practice through strategic planning, technology implementation, and client assessments.
CAS roundtables	Scheduled meetings for CAS leaders to discuss and share their experiences and strategies.
CAS success factors	Key elements that contribute to the success of a CAS practice, including internal and external marketing channels, value-based selling, and KPIs.
Client discovery	The process of understanding a client's needs, challenges, and goals to provide tailored solutions.
Client nurture	The process of building and maintaining strong, long-term relationships with clients to ensure satisfaction, support retention, and sell additional new services.
Competitive analysis	The process of understanding the strengths and weaknesses of market competitors to build a more tailored approach that resonates with the audience.
CRM (Customer Relationship Management)	A system used to manage customer interactions, track sales, and improve customer relationships.
External CAS messaging	The communication strategy used to convey the value and benefits of Client Accounting Services to potential clients, emphasizing expertise, efficiency, and tailored solution.
Fractional marketing services	Marketing services provided on a part-time or temporary basis by an external firm.
KPI (Key Performance Indicator)	A measurable value that demonstrates how effectively a company is achieving its key business objectives.
Lead generation	The process of attracting and converting strangers and prospects into someone who has indicated interest in a company's product or service.
Lead qualification	The process of evaluating potential clients to determine their suitability and readiness for the services offered, ensuring they meet specific criteria for engagement.
Marketing and sales funnel	A model that describes the journey a customer takes from awareness to purchase, including stages such as lead generation, demand generation, and client nurture.
Marketing and sales playbook	A comprehensive guide that outlines strategies, processes, and best practices for effectively attracting, engaging, and converting prospects into clients.
Net client fees per professional (NCFPP)	A key performance metric that is calculated by dividing the total net client fees (or net revenue) by the number of full-time equivalent (FTE) professional staff, including equity partners.
NPS (Net Promoter Score)	A metric used to measure customer satisfaction and loyalty by asking clients how likely they are to recommend a company's services.

Marketing, sales and metrics	
Onboarding procedure	The steps taken to integrate a new client into a firm's services, including discovery, assessment, and recommendations.
Payment processing	The systems and methods used to handle transactions between clients and service providers.
Pipeline tracking	The process of monitoring and managing the stages of the sales process to forecast revenue, identify growth opportunities, and maintain client engagement.
Practice growth	The expansion and development of a firm's practice, typically measured by metrics such as revenue increase, client acquisition, service diversification, and staff development.
Product portfolio brochure	A marketing document that showcases a company's range of products, highlighting features, benefits, and specifications to inform and attract potential customers.
Sales engagement process	The series of interactions and activities between a sales team and potential clients aimed at building relationships, understanding needs, and ultimately converting prospects into customers.
Sales Qualified Lead (SQL)	A lead that has been vetted by the sales team and deemed ready for direct sales follow-up has moved into sales qualified opportunity phase.
SEO (Search Engine Optimization)	The practice of optimizing a website to rank higher in search engine results, increasing visibility and traffic
Serviceable Available Market (SAM)	The proportion of the market that fits your ICP.
Serviceable Obtainable Market (SOM)	The proportion of the market that is reachable.
Strategic marketing consulting	Advising businesses on high-level marketing strategies to enhance their competitive positioning, drive growth, and achieve long-term objectives.
Total Addressable Market (TAM)	The size of the largest possible market.
Value-based selling	A sales approach that focuses on customer needs, challenges, and goals rather than just product features, emphasizing delivering outcomes rather than outputs.