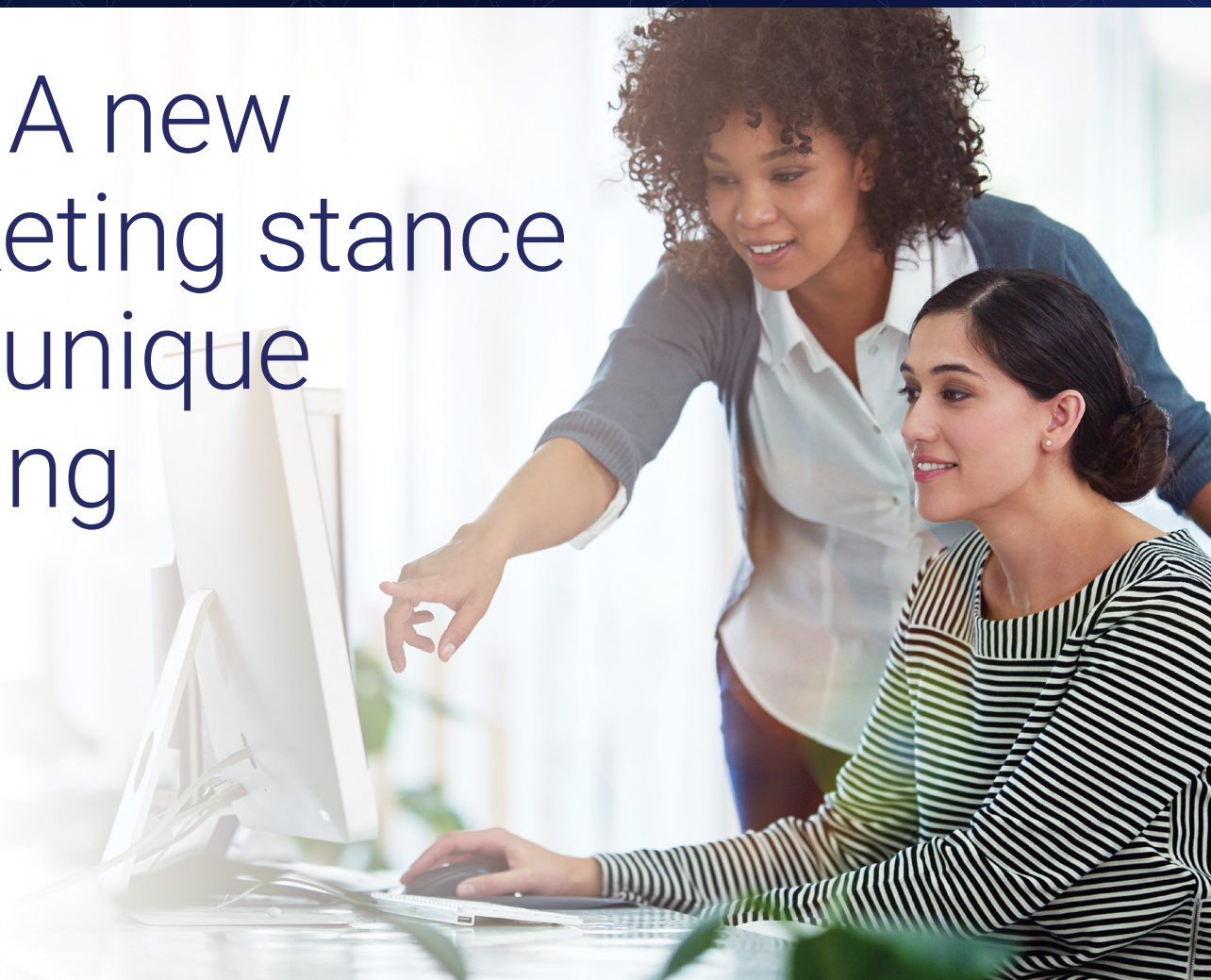


CAS: A new marketing stance for a unique offering



Client advisory services (CAS) is the fastest-growing service line for accounting firms. But there are signs that its strong growth is constrained by market confusion. Many clients still don't understand the value of CAS or confuse it with lower-level bookkeeping. Even within firms, many accounting professionals don't understand its real value.

At its core, this is a marketing and messaging challenge. CAS leaders report that they still rely heavily on client referrals and word-of-mouth to drive sales. They also say that their own peers within their firms

haven't been sold on CAS – it's not part of many firms' core strategies or strategic plans. This is where focused internal and external marketing efforts can have an immediate impact.

CAS is different.

It's a whole new way of meeting clients' accounting and finance needs. It engages different decision makers than traditional accounting services. And it's facing competition from a new crop of well-funded, digital-native providers. Marketing CAS requires firms to mature beyond traditional marketing tools and practices to digitally-informed approaches.

Here's an at-a-glance guide to some of the specific ways CAS leaders should shift their marketing approach to reach clients more effectively – and drive more sales, faster.

Traditional approach	Traditional challenges	Modern marketing approach	Why it works
In-person networking	Effective – but time-consuming with limited reach.	Social media-based: Online roundtables, partner LinkedIn profiles, Google reviews, etc.	Wider reach and visibility with lower effort, generates content that can be repurposed.
Email blast campaigns	Inability to target right recipient with right CAS message.	Highly segmented, personalized messaging accelerated by automation tools.	Highly efficient, drives higher open rates and more engagement.
Print advertising & web banners	Expensive and limited ability to target.	SEO, geotargeting, display advertising, LinkedIn	Microtargeting capabilities for reaching clients with relevant messages.
One-domain websites	Heavy burden on visitors to find the CAS services they need.	Multi-domain strategies that use targeted domains and CAS-specific content.	Improved search and AI visibility, draws prospective clients looking for CAS-level services.
Purchased content & custom writing for blogs, email campaigns, etc.	Expensive and time-consuming.	AI for high-speed, lower-level content needs (email drafts, social media posts, etc.)	Less time and budget spent on low-level, high-volume content.
In-person events	Highly effective but expensive, requires significant planning and coordination, limited reach.	Online polling, webinars, streaming, networking platforms.	Expanded reach, reduced planning and resource commitments

In many ways, evolving your approach to marketing your practice doesn't mean abandoning the traditional approach completely, but shifting the mix of activity to help scale your presence and message.

Need help? Start here.

Learn more about how you can enhance your CAS firm marketing by downloading this all-in-one toolkit that gives you practical, tactical resources to drive measurable results.

For additional information about the Sage Intacct Accountants Program, visit **[CPA.com/client-accounting](https://cpa.com/client-accounting)**