

✓ Checklist

5 ways to drive CAS revenue expansion



INTRODUCTION

5 ways to drive CAS revenue expansion

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Client advisory services (CAS) remains a high-growth practice for accounting firms. A recent survey from CPA.com found that firms are expecting 99% growth for their CAS practices over the next three years.¹ Can your firm meet this same level of projected growth?

CAS expert Jason Blumer, CPA, CEO of Blumer CPAs and the accountant entrepreneur organization Thriveal Network, offers 5 high-impact ways to increase CAS revenue.

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1. **Focus on treasury management and cash flow**
 2. **Set training and onboarding protocols**
 3. **Dedicate a team to your CAS practice**
 4. **Roll out value pricing and tiers**
 5. **Double down on niches**

01

6 in 10 financial leaders say that managing cash flow is a top priority in 2025.²

Focus on treasury management and cash flow

Cash flow can make or break a business. Your firm can help clients navigate financial challenges and demonstrate immediate value with cash flow reports and predictions.

Blumer recommends reporting cash flow bimonthly or even each week, which will cause stickier client relationships and a strong referral network. Helping clients understand how to use different digital payment options to map strategic priorities reinforces the value you bring. Advisors should offer thoughts on cash management and pacing of collections, which banks to use, how much to save, and how much debt to carry.

Cash flow insight can be expedited with three automated technologies:

1. **AP/AR** - helps clients pay and get paid with a variety of payment options like same-day international wires, ACH, corporate cards, and checks.
2. **Spend and expense management** - tracks and manages spend at no charge with business cards, virtual cards, flexible awards, and budgeting.
3. **FP&A** - provides better business decisions faster with automated financial forecasting, visibility into AP trends, and predictive modeling of future cash flow.

02

Set training and onboarding protocols

Technology is at the core of a highly efficient and scalable CAS practice. But without software training for your team and onboarding processes for clients, you're leaving money on the table.

When your staff is tech savvy and knows how to use different tools, they tend to work faster and make fewer mistakes—which means they can handle more clients in less time. They can also spot more opportunities to automate and use advanced features. With a service like CAS, a team's consistency in delivery is key to efficiently producing profit in this service.

According to Blumer, each team member should take [online training programs for software that offer CPE credit](#). Then, follow up with process training, including how to use software internally and with clients.

Work with clients so they understand why and how. It's another efficiency boost, since it'll promote self service, less frustration, and greater understanding of the tech big picture. Your touchpoints with CAS clients can then focus on advisory, not tech support.

At Blumer's firm, his **client onboarding checklist** includes:

- ✓ A kickoff that explains the importance of the new software and apps
- ✓ An orientation that focuses on important workflow-related features by role
- ✓ Training documentation and videos
- ✓ Calling clients the first 30-60-90 days to check on progress
- ✓ Using each touchpoint to create a runway for new software and services

89% of accounting professionals say that automation in financial operations makes their firm more profitable and efficient.³

03

Dedicate a team to your CAS practice

Your team is a make-or-break component of your CAS offerings. Asking staff members to do double duty—one foot in tax and one in CAS for example—limits their ability to [upskill](#) as needed and constrains growth.

Blumer suggests launching CAS with dedicated staff—an approach backed by research.

Other areas Blumer suggests include:

- Over time, build specialized teams by industry or service line to improve efficiency and deepen client relationships.
- Create pod models of service with a Lead on each client, an accountant/bookkeeper and/or bill pay expert on each client, and other specialty team (like tax) that can get to know the client well.
- Create career growth opportunities to move team experts up the ladder and take on (and learn) new skills. This also helps retain top talent and the knowledge they bring to the table. People want to know that there's an opportunity for growth so be sure to create a career path with team members and sit down with them regularly to check in.



04

“When you price based on value, you put your clients at the center of the process.”

Jason Blumer, CPA

Roll out value pricing and tiers

Moving away from traditional hourly billing leads to predictable, and often, higher revenue. After all, there are only so many hours in the day to bill.

Blumer points out that [value-based pricing models](#) reflect the true worth of your services and let you offer flexible service packages tailored to client needs and budget. He suggests creating three levels of value-based pricing (for example, premium, standard, and basic). Lead with the highest option first to explain the full breadth of your services, and then extract services as you go down the list.

These pricing strategies support recurring revenue streams that extend year-round, smoothing out cash flow and potentially increasing overall revenue per client.



05

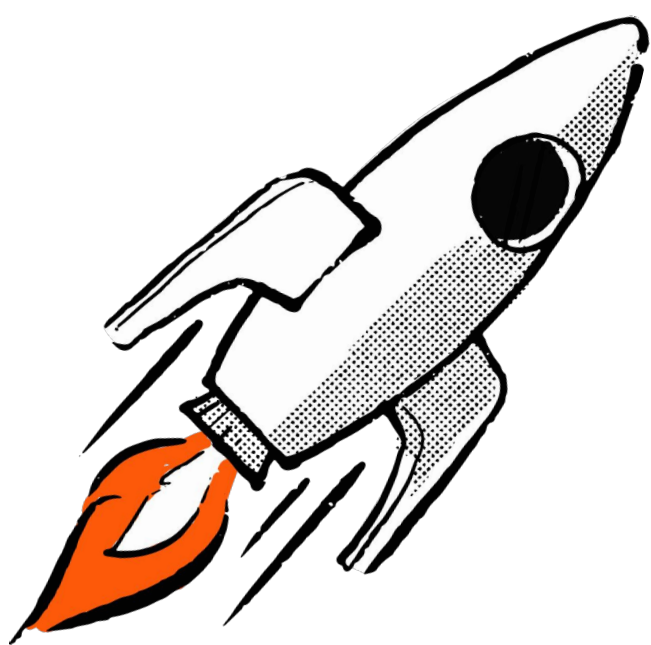
Double down on niches

Specialization in a niche paves the road for faster CAS growth and allows you to serve more efficiently. While businesses across various industries share core financial functions—such as managing general ledgers, cash flow, and seeking actionable insights—each industry also presents unique needs and challenges. For example, an e-commerce company will have different considerations than a nonprofit organization.

This is a CAS strategic advantage.

By positioning your firm as a trusted advisor with [specialized niche knowledge](#), you can build stronger, more profitable client relationships. This approach not only diversifies your revenue streams, but also attracts other businesses in that industry and creates a blueprint for future expansion.

Blumer suggests exploring your client base to find areas of existing niche concentration and pairing them with your team's experience. This creates ideal entry points to build from, allowing you to refine your niche focus and growth and create a blueprint for future expansion.



“Firms who report revenue of 50% or more from defined industry niches see more success in CAS, beginning with growth. This group reports a median 20% growth over the previous year and a projected 17% growth for the current year.”¹



Bonus: kick up CAS marketing

It's time to amplify growth and profitability with CAS, and these five strategies are a great place to start. Once your service line is defined and you have pricing in place, it's time to start marketing and selling strategically, which is so much easier with a standardized offering.

You can also develop a referral program to incentivize [existing clients](#) to bring in [new business](#) and/or partner with software providers or industry associations to take advantage of co-branded marketing efforts.

Also consider exploring the [BILL Financial Operations Platform](#) to enhance your CAS offering.



Accelerate CAS growth with BILL

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¹ 2024 CPA.com & AICPA PCPS client advisory services (CAS) benchmark survey.

² [Top 9 takeaways from the BILL 2025 Finance Leader Outlook](#)

³ [The BILL accounting firm automation opportunity report](#)

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