

MEETING SUMMARY

Building & Selling CAS: Defining Value and Driving Growth

Date: September 16, 2026

■ Quick Recap

Advisory practices are being defined firm by firm, and the definitions differ widely — from controller-level support through to a fractional CFO partnership. What the more established practices share is structure: a standardized menu of service types, templates that carry a new client through setup, subscription pricing rather than hourly billing, and engagement letters written to advisory standards rather than adapted from compliance work. The session worked through four areas — how advisory is defined inside a firm, which clients are worth pursuing, how the work is sold, and how it is priced.

■ Summary

Defining Advisory Within a Firm

There is no settled definition, and the range is wide. At one end the work looks like controller-level support; at the other it is a fractional CFO partnership, where the engagement begins from clean books and advisory is layered on once the accounting is reliable. Service depth and meeting frequency are set against what each client needs rather than sold as a fixed package. One practice reduced that variability by building a standard menu of **10 to 12 defined service types**, which turns an open-ended conversation into a selection.

Standardization and Templates

Templates carry new clients through setup and keep delivery consistent as a practice scales — particularly useful in nonprofit work, where engagements repeat in shape. The same approach applies to documenting new integrations and processes as they are built, so the knowledge does not sit with one person. AI tools are being used in delivery alongside those templates.

Client Selection and Segmentation

The most receptive clients are business owners lost in the day-to-day who have not planned for what comes next; the work is helping them either transition the business or maximize its return. Entrepreneurs running multiple

businesses or holding complex portfolios respond best, because the complexity itself creates the need. **Starting a relationship with advisory converts better than moving an existing bookkeeping client up into it** — a client who arrived for compliance work tends to keep valuing the engagement at compliance rates.

Sales and Business Development

Two prospecting routes came up repeatedly. The first is looking at the vendors an existing client already uses and treating them as warm prospects. The second is internal: tax relationships surface clients whose needs have outgrown the filing, and those referrals move into broader advisory work. Industry specialization was the recurring theme — a defined niche sharpens both the pitch and the delivery, and the prevailing intent was to pursue specific industries deliberately rather than selling horizontally.

Pricing Models

Most practices have moved from hourly billing to **subscription pricing**, with genuinely complex engagements still handled hourly by exception. One subscription structure runs from **\$1,000 per month at entry to \$8,800 at the top**, with the tier set by scope rather than by hours consumed. On how to arrive at a number, the room was split between pricing calculators and pricing on judgment; neither was presented as settled practice.

Engagement Letters

Engagement letters were identified as the most common gap. Letters carried over from compliance work do not describe advisory scope, which leaves both the deliverable and its limits undefined. The intent coming out of the session was to rewrite them so the advisory relationship is documented to the same standard as the work itself, and to pair that with subscription packaging rather than treating the two as separate exercises.

Handling a Poor Client Fit

Where a client is a poor fit, the preferred route is **adjusting the fee rather than terminating the relationship**. Repricing tests whether the engagement can work at a rate reflecting what it actually costs to serve, and lets the client resolve the question themselves — a cleaner exit than a termination conversation, and one that leaves the relationship intact if they stay.