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**From Compliance to Advisory:
Empowering CAS Teams for Exceptional Success**

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Learning Objectives

- **Understand the Strategic Shift:** Learn why CAS must evolve from compliance-focused to advisory-driven and how this transformation adds value for clients and firms.
- **Develop High-Performing CAS Teams:** Identify key roles, skills, and technologies necessary to build proactive, insight-driven advisory teams.
- **Implement Change & Measure Impact:** Explore strategies for leading organizational change, gaining team and client buy-in, and tracking success through performance metrics and client outcomes.



Agenda

- The Mission
- Setting the Course
- Building the Crew
- From Compliance to Advisory
- Tools & Technology
- Making it Stick
- Call to Action

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The Mission

Why CAS Needs to Evolve

CAS is Not a Commodity

Problem Statement:

CAS Teams are often seen as transactional rather

Objective:

Transition from compliance-focused to advisory-driven teams

Key Message:

Managing CAS isn't just about efficiency-it's about creating value-drive client relation

Setting the Course

The Role of Leadership

Leadership Roadmap

Vision & Direction:

Leaders must instill a culture of proactive advisory

Team Structuring:

A balance between compliance, technology, and advisory roles

A CAS Lead:

Having a designated CAS leader is critical to the success of the business line

Building the Crew

Key Elements for a Successful CAS Team

High Performing Teams

Roles & Responsibilities:

CAS Accountants to Data Processors

CAS Analysts to Insight Generators

CAS Advisors to Strategic Partners

Technology Enablement:

Automation frees up time for advisory

Skill Development:

Training on client interaction, business acumen, and strategic thinking

From Compliance to Advisory

The Shift in Mindset

Adding Value

Traditional CAS:

Transactional, reactive, compliance-focused

Modern CAS:

Proactive, strategic, business advisors

The Advisory Advantage:

Higher-value services = Greater revenue + Stronger client relationships

Tools & Technology

Making it So

A CAS Team's Transformation

Automation & AI:

Leveraging cloud accounting, AI-powered insights

Workflow Optimization:

Standardized processes for efficiency

Client Portals & Dashboards:

Delivering real-time advisory insights

Making it Stick

Change Management & Adoption

Setting Expectations

Internal Buy-in:

Educating teams on the value of advisory

Client Communication:

Setting expectations for an advisory-first approach

Performance Metrics:

Tracking advisory contributions along side KPI (ie. Revenue per FTE and Gross Profit Margin)

Call To Action

Final Directive

Empowering CAS Teams for the Future

Empower your CAS Teams:

Invest in People, Processes, and Technology

Shift from Reactive to Proactive:

Make advisory the core service

Measure Impact:

Success is not just numbers-it's Client Success and Business Growth

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David Allen

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