

Hey! What's New? 2025-95

How Smart Firms Use Forecasting to Fuel CAS Growth

A blog on the CPA.com webpage, written by Evan Wells, advises that “if your firm is still relying on historical reporting alone, it’s time to rethink your strategy. Clients today expect more than a clean set of books; they want actionable insight and proactive guidance to give them confidence in the path ahead. The good news? You don’t need an enterprise-sized team or budget to deliver the guidance they seek.”

Firms of all sizes, he says, “are unlocking new growth by leveraging forecasting as a cornerstone of their client advisory services (CAS) model. By combining modern reporting tools, proven frameworks and scalable processes, these firms are shifting from transactional support to strategic impact—and setting a new standard for how they deliver client value.”

Today, he adds, “clients need more than reports to keep up in the market; they need insight to drive the decisions they are making. They want to know:

- How are we tracking against goals?
- Can we afford to hire?
- What’s our cash runway?

This is where financial planning and analysis (FP&A) comes into play.”

Wells points out that, “thanks to AI-enhanced tools and accessible platforms like Jirav, firms can offer forward-looking insights without needing massive budgets or staffing changes. They don’t need to predict the future perfectly. Instead, they enable smarter decisions through directionally-sound planning.”

In one example, Wells notes that the company introduced a deceptively simple model called The Five Drivers of Growth™. “It helps firms focus advisory conversations around operational bottlenecks, such as:

- **Providers:** Do you have enough licensed professionals to deliver services?
- **Support team:** Is your team structured to scale?
- **Client flow:** Are you attracting enough of the right business?
- **Infrastructure:** Do you have the space, systems and/or software to grow?
- **Tech stack ROI:** Are your tools saving time and enabling action?”

This model, Swells says, “is straightforward but impactful enough to spark meaningful discussion. These drivers form the basis of the forecasting model built for the client. By grounding forecasting in day-to-day operations, firms move beyond theory to create tailored, actionable plans that drive informed decision-making.”

The team in the example also made forecasting a repeatable process. “They transitioned from *ad hoc* spreadsheet work to a templated, cloud-based workflow. In one case, a former client-turned-team-member mastered the system in just 60 days and now leads client delivery for the firm. That’s the value of tools that teach, standardize and scale.”

Naturally, Wells, notes, some professionals are hesitant to embrace AI-driven planning. Here are a few concerns he’s heard:

- **"AI is too risky.** Think of it like an intern who never sleeps. It accelerates setup but doesn't replace your judgment or nuance."
- **"We're too unique for this.** Every business feels unique. But the drivers of growth are universal. Personalization occurs after the baseline is established."
- **"It's too expensive.** What's the cost of lacking insights? When business conditions change, real-time insight is a safeguard, not a luxury."

According to Wells, "let's say a client is worried about staffing costs in Q4. With a few driver-based adjustments, you can present them with scenarios that guide them toward an informed decision. That's when hesitation fades and confidence soars."

Advisory work can get messy without structure, though, he points out. That's why the example team "leans on SOPs, asynchronous training and a centralized learning hub. Together, these systems turn ambiguity into repeatable action."

Standardization, he adds, "also helps you in other ways:

- Speed up onboarding.
- Ensure consistency across clients.
- Reduce burnout from custom workflows.
- Build staff confidence and retention."

With the right systems, Wells concludes, "forecasting becomes less of an art project and more of a repeatable process with room for professional judgment. That is the heart of forecasting in CAS. It's not about financial wizardry but about creating space for clients to make smarter, quicker decisions in uncertain times. When your firm brings clarity, your clients know they can trust you."

For more, read [How smart firms use forecasting to fuel CAS growth | Blog | CPA.com](#).