4impactdata

10X ADVISORY®

THE FIVE STEP PROCESS

2025

EXECUTIVE SUMMARY

Client Advisory Services (CAS) is the fastest-growing service line in accounting. But with growth comes pain. Firms are hitting a ceiling on advisor capacity, and many teams are stuck reacting to client issues instead of leading proactive conversations.

INTRODUCTION

The 2024 CPA.com Benchmark Survey showed CAS practices deliver 51% higher revenue per client compared to compliance work. The opportunity is real. Yet firms everywhere struggle to scale without burning out staff or sacrificing quality.

At Creative Planning, Travis Scheving saw this problem first-hand. Preparing for client meetings used to take 2–3 hours of manual work. With the right system, that prep now takes seconds. That is the power of moving from dashboards and reports to guided action.

The biggest names in accounting, including Barry Melancon and Randy Johnston, have partnered with 4impactdata to bring this transformation to life. As Aaron Harris, CTO of Sage, put it: “4impactdata is exactly what the CPA profession needs.”

This is what we call 10X Advisory®—scaling advisor impact so firms can deliver Wall Street-level intelligence to Main Street businesses. Here’s the 5 step process to make it happen.

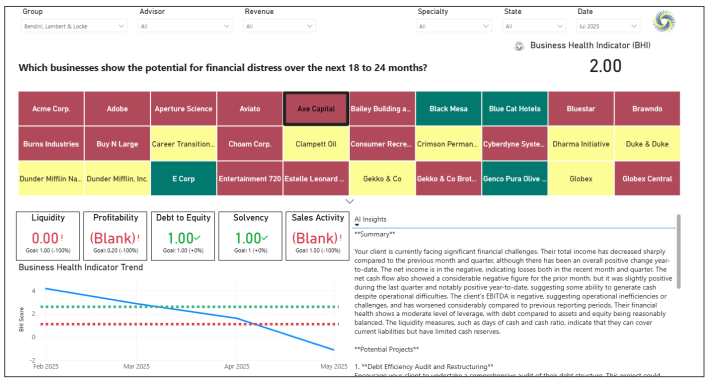
STEP 1: CONNECT & BASELINE — SEE THE TRUTH

Emerging CAS teams often juggle QuickBooks files, spreadsheets, and siloed reports. The first step is connecting the data.

With one connection, 4impactdata pulls every client book into a single view—regardless of system. QuickBooks, Intacct, Xero, NetSuite—doesn’t matter. You see the firm’s client base as a whole: demographics, industries, growth patterns, and risks.

This baseline shows you the truth. Who are your most profitable clients? Which ones are at risk? Where is there untapped opportunity? Instead of gut feel, you get a complete snapshot across the firm.

For many Managing Partners, this is the first time they’ve ever seen their CAS portfolio in one place. And it changes the conversation from “what happened” to “what should we do next.”



Business Health Indicator

STEP 2: PACKAGE & PRICE — MAKE IT EASY

Once you see the client base clearly, the next step is to package services so buying and selling is simple.

Firms that struggle with advisory growth often price in the dark—hourly rates, a la carte add-ons, or inconsistent proposals across partners. The result: advisors undervalue their services, and clients don't understand what they're buying.

Using demographic and risk data from Step 1, you can design tiered packages that fit real client needs. For example:

- Growth clients get proactive cash flow forecasting.
- Stable clients get monthly monitoring and quarterly strategy.
- High-risk clients get weekly reviews and rapid alerts.

This turns advisory into a product with clear scope, clear outcomes, and clear value. It also makes cross-sell easier—because you can show a client why they belong in a higher tier, backed by data instead of guesswork.

When pricing is simple and consistent, you capture more revenue per client and shorten the sales cycle.

STEP 3: TARGETED OUTREACH & PIPELINE BOOST — CALL THE RIGHT PROSPECTS FIRST

One of the biggest drains on advisor capacity is wasted time chasing the wrong conversations.

With baseline data and pricing in place, you can now rank clients and prospects by urgency and opportunity. Who is at risk of churn? Who is growing fast and ready for more guidance? Which clients have cash flow red flags that require an immediate call?

This flips outreach from reactive to proactive. Instead of waiting for clients to ask questions—or worse, waiting for problems to explode—you lead the conversation with data-driven insights.

Advisors who do this consistently see a measurable pipeline boost. Every alert is a reason to pick up the phone. Every check-in is rooted in "I noticed this trend in your numbers" instead of "How are things going?" That shift makes advisory sticky, credible, and scalable.

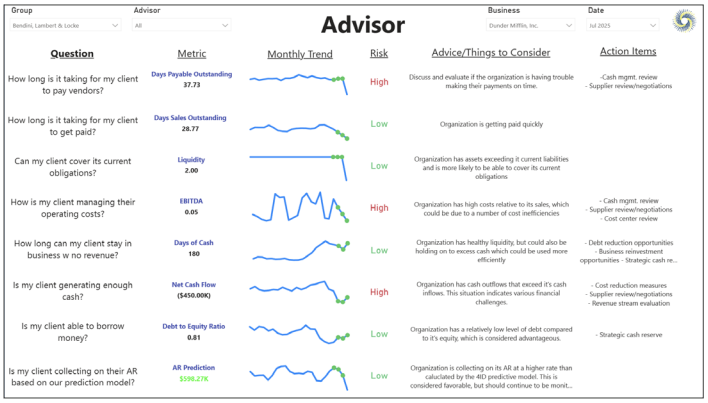
STEP 4: ADVISOR ENABLEMENT — SCALE BRAINS, NOT BODIES

Even the best advisors can only handle so much. Traditional CAS models cap out because capacity is tied to individual expertise.

Advisor enablement changes that. By embedding Codified Wisdom™ into the platform, firms can scale knowledge across the entire team. Junior staff get prompts that reflect senior-level judgment. Experienced advisors get faster prep and richer insights.

For example, if a client's AR days spike, the system doesn't just flag it. It suggests proven strategies: adjust terms, review credit policies or bring AR under the outsource accounting function your firm already provides for reliable results. Advisors can act immediately, instead of researching from scratch.

This is how you expand capacity without adding headcount. One advisor can now oversee 50–100 clients proactively. You scale brains, not bodies—unlocking growth without overloading your team.



BGPS Recommend - AI Advisor Financial

STEP 5: AUTOMATE, OPTIMIZE & EXPAND — RUN ADVISORY LIKE A PRODUCT

The final step is building advisory as a repeatable engine.

Once data, packaging, outreach, and enablement are in place, automation takes over:

- Alerts fire when risks emerge.
- Meeting prep packets generate in seconds.
- Follow-ups and reminders flow automatically.

This is how firms move from one-off projects to consistent, scalable advisory. You run advisory like a product—predictable, measurable, and expandable.

And expansion matters. With the right system, firms don't just save time. They create new revenue streams: M&A advisory, wealth management referrals, industry-specific guidance. Advisory becomes the growth driver for the whole firm.

10X ADVISORY®, 10X IMPACT

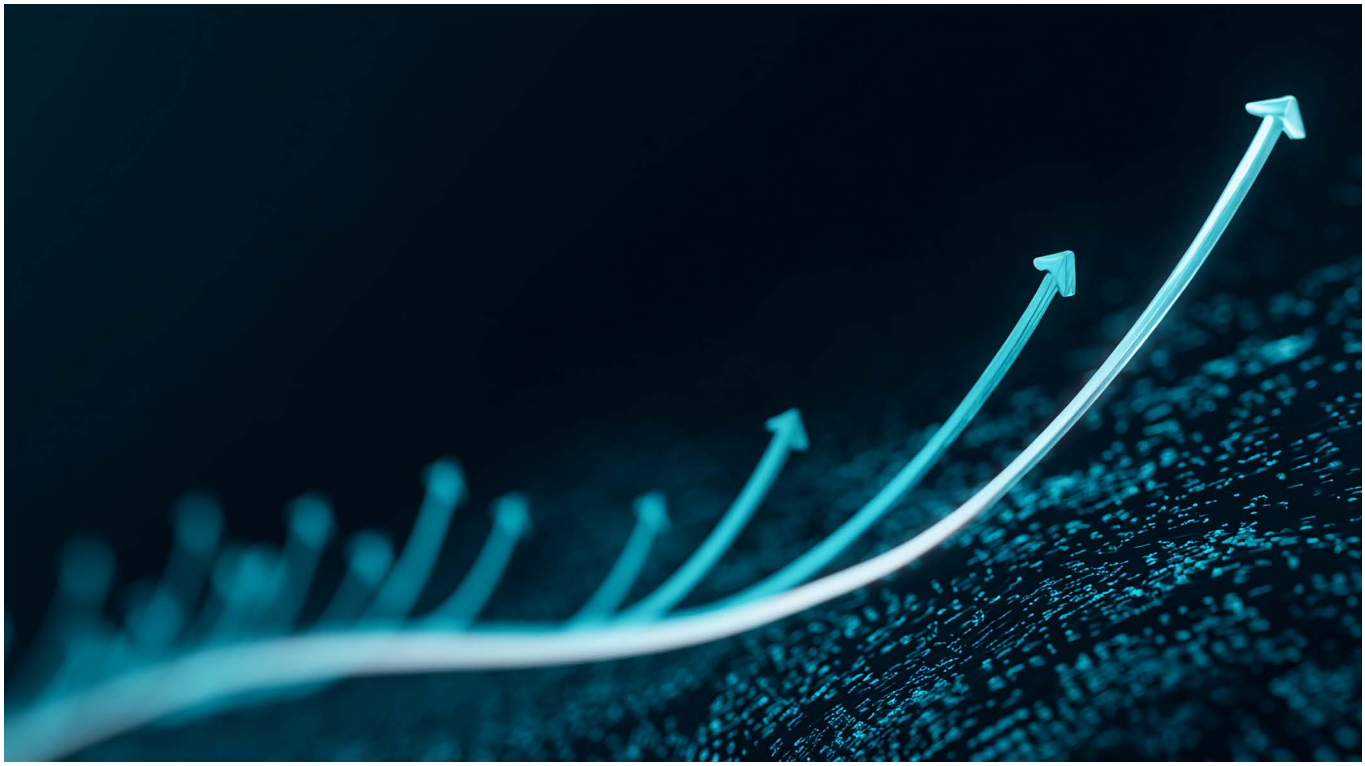
This 5-step process isn't theory. It's what firms across the country are using to change the odds for small businesses.

- Capacity: Advisors cover more clients without burning out.
- Revenue: Firms lift revenue per client by over 50%.
- Quality: Conversations shift from reactive reports to proactive strategy.

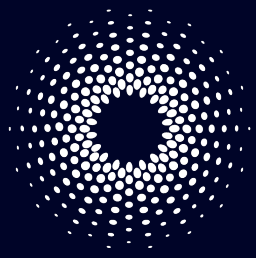
This is the future of advisory: Wall Street to Main Street. The same intelligence used by billion-dollar companies, now in the hands of local advisors guiding small business owners.

As one Managing Partner told us:

"Scaling CAS used to feel impossible. Now we see a path to serve 5x more clients with better advice, not less."



10X Advisory®
4impactdata
Built for CPA Firms and Advisory Teams



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