

# Accelerating the path to business insights advisory

How Baker Tilly is reimagining their client advisory services (CAS) model through CPA.com's CAS 2.0 framework

## CPA.com and Baker Tilly Firm success story

In October 2021, Top 10 CPA advisory firm Baker Tilly acquired AcctTwo Shared Services, LLC, a consecutive Partner of the Year for Sage Intacct®.

The team at Baker Tilly began to integrate their new capabilities — as both a value-added reseller (VAR) and managed services provider of Sage Intacct — to develop end-to-end solutions for their business clients.

To support re-envisioning their CAS practice, the leaders at Baker Tilly engaged the experts at CPA.com, thought leaders in the accounting profession on change management and digital transformation. CPA.com is also the business and technology subsidiary of the American Institute of CPAs (AICPA).

"Our move into product development and enhanced managed services signaled to the marketplace our intention to lead the evolving financial and accounting advisory space," said Angela MacPhee, Managing Partner of Consulting at Baker Tilly. "CPA.com had the research, framework and objectivity to accelerate our strategy formulation."

As Baker Tilly's CAS practice grew, they faced familiar challenges that could limit their potential for expansion. "There is an inherent perception in the profession that CAS is just for bookkeeping or [accounting] for tax," said Missy Thompson, partner and CAS practice leader. "At Baker Tilly, we are building a scalable solution and service delivery model that includes business insights and industry-specific data analytics."

Working with CPA.com, Baker Tilly launched a critical engagement to reimagine the possibilities for transforming their CAS practice.

## How CPA.com's CAS 2.0 framework accelerated the path to business insights advisory

As innovators and pioneers in the profession, CPA.com has helped launch, grow and evolve the CAS category for the accounting profession from its inception. To help firms deliver high-value CAS in today's digital environment, CPA.com developed CAS 2.0, a methodology and framework that aims to enable firms with a holistic business model for scaling a high-value, differentiated client advisory service through key areas of focus, helping to navigate critical organizational and practice level challenges associated with establishing and growing a CAS practice.

### Firm profile



**Baker Tilly US, LLP (Baker Tilly)** is a leading advisory CPA firm, providing clients with a genuine coast-to-coast and global advantage in major regions of the U.S. and in many of the world's leading financial centers – New York, London, San Francisco, Los Angeles and Chicago.

**Headquarters:** Chicago, IL

**Company size:**  
5,001–10,000 employees



**Missy Thompson**  
Partner and CAS Practice Leader



**Angela MacPhee**  
Managing Partner of Consulting

## CPA.com CAS 2.0 methodology & framework



As Baker Tilly set their eyes on what's next, CAS 2.0 served as a blueprint to redefine the future. The team of expert CPA.com consultants started with a comprehensive current state assessment, conducting interviews with important stakeholders from across the organization to better understand current perceptions, expectations and experiences with the firm's CAS practice. From there, they created a map of Baker Tilly's current offerings and identified how and where CAS-oriented services would best complement them. "Our engagement with CPA.com was objective validation for the way we were thinking about our business – and got us thinking even bigger," said MacPhee.

Building on these insights, Baker Tilly worked with CPA.com to develop a strategy that focused on the intersections of practices across the firm which are critical to the long-term success of their clients and their CAS practice. And it's working. "CPA.com helped us all get on the same page," said Thompson. "In interviewing all our stakeholders, we gave them a voice – it really raised awareness of the opportunity in the financial and accounting advisory space, and it validated and elevated our CAS practice along the way."

MacPhee agrees: "Our engagement with CPA.com was an injection of confidence, allowing us to establish connective tissue across the organization. Ultimately, that brought clarity to our roadmap and cleared the path to go faster."

### Trusted, hands-on experience

The CPA.com Professional Services team helps CAS practices to accelerate sustainable growth by combining proven growth strategies with expert insights. CPA.com empowers firms to develop strategies to navigate change, optimize operations, and achieve lasting practice transformation through a portfolio of custom-tailored services. According to Thompson, "The credibility and objectivity that CPA.com consultants brought was key – having an outside, independent voice be part of our transformation accelerated the process for us."

To learn more about how CPA.com can help your firm to evolve and expand its CAS practice, visit: [CPA.com/CAS](https://CPA.com/CAS), or contact us at: [inquire@hq.cpa.com](mailto:inquire@hq.cpa.com).