INSIDE THE CAAS CIRCLE

FALL 2026



Building a More Scalable, Profitable CAAS Practice

CAAS leaders are rethinking how their practices operate as AI, automation and evolving client expectations change the way services are delivered. The focus is moving beyond efficiency to building stronger processes, developing advisory-ready teams and measuring success in ways that reflect the value firms deliver.

SIGNALS FROM THE ROOM

SIGNAL 1 CAAS Success Requires New Performance Measures

Traditional metrics like billable hours and utilization don't always reflect the success of a recurring advisory model. Leaders are looking more closely at profitability, revenue per client, capacity and client outcomes to understand performance and make better decisions about growth.

SIGNAL 2 Client Onboarding Is Becoming a Strategic Priority

As CAAS practices grow, inconsistent onboarding creates challenges for clients and internal teams. Firms are focusing on standardized intake, clearer ownership and better communication between sales and delivery, while identifying opportunities to automate repetitive steps without losing the personal connection.

SIGNAL 3 Developing Advisors Requires a Different Approach

AI, automation and global talent are changing the work that traditionally helps junior professionals build technical knowledge and judgment. CAAS leaders are considering how to create more intentional learning experiences that develop analytical thinking, client communication and advisory capabilities earlier in employees' careers.

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3 THINGS CAAS LEADERS ARE TESTING

- **Automating Client Intake**
  Using SharePoint, Power Automate and standardized templates to organize prospect information, create onboarding documentation and reduce administrative work.
- **Rethinking Performance Scorecards**
  Exploring metrics such as department profit margin, completed work, revenue per professional and workflow progress as alternatives or complements to traditional time-based measurements.
- **Redesigning Advisory Development**
  Mapping responsibilities that can shift to automation or global talent and identifying new experiences that help employees practice analysis, judgment and client-facing skills.

WHAT WE'RE HEARING

Efficiency Alone Isn't Enough
Automating work creates capacity, but firms still need to develop the capabilities and service offerings that turn that capacity into greater client value.

Standardization Comes Before Scale
Technology can accelerate processes, but inconsistent service definitions, unclear ownership and disconnected workflows can limit its impact.

Accountability Is Moving Beyond Hours
As firms explore alternative pricing and delivery models, leaders need reliable ways to measure results, manage capacity and protect profitability.

TAKE IT BACK TO YOUR FIRM

Which metrics best reflect the profitability, efficiency and client value of our CAAS practice, and what are we missing today?

Where are manual processes, unclear responsibilities or communication gaps creating friction in our client onboarding experience?

As AI and automation take on more routine work, how are we ensuring our people still develop the technical judgment and advisory skills they need?

CONNECT THE DOTS

Building a scalable CAAS practice requires more than adopting new technology. It means aligning processes, people, pricing and performance measures around the value clients expect.

Inside the Boomer CAAS Circles, leaders compare approaches, share practical examples and work through the decisions shaping their practices.

How is your firm preparing for the next stage of CAAS growth?

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