Valueonshore Advisors
EXPERIENCE | CLARITY | FOCUS

CASE STUDY

Enhancing Client Experience and Value Delivery for a US Based CPA Firm

Valueonshore Advisors has partnered with various CPA firms across United States of America & Canada.

THE CLIENT

Leading US based CPA firm with clients across the globe.

BUSINESS NEED

The CPA firm was required to focus on onboarding new clients and **retain** existing ones by ensuring quality in service delivery, **maintaining** timelines and by being cost-effective.

BUSINESS CHALLENGE

The business challenges were impacting its operations, growth, and profitability such as:

1. Peak load requirement of managing multiple projects was impacting their response time and quality of deliverables to clients.
2. Limited visibility to keep its high-cost employees gainfully occupied throughoutthe year.
3. Additional costs of skilled manpower and enhanced training to manage attrition.
4. Inability to keep pace with the timely updation of technological developments, such as automation, cloud computing, data analytics and artificial intelligence.
5. Insufficient time to stay connected with the changing regulatory requirements such as accounting standards, Tax law and Compliance requirements.

Evaluation of accountability and decision-making hierarchy

OUR APPROACH

- **Centralized resource pool (Shared Services):** Created a common delivery pool that can be deployed dynamically across projects
- **Resource planning** and allocation based on project complexity and urgency.
- **Advance capacity planning:** Forecast project pipeline and align resources proactively.
- **Real-time utilization dashboards**: Track billable vs non-billable hours across teams.
- **Tiered staffing model**: Use a pyramid structure (senior–mid–junior) to optimize cost of delivery.
- **Knowledge management systems:** Create SOPs, playbooks, and repositories to reduce dependency on individuals.
- **Retention strategy:** Introduce career paths, incentives, and engagement initiatives to reduce attrition.

Results Delivered:

- Increased Operational Efficiency and Service Quality
- Resource Optimization and Increased Productivity
- Cost Optimization
- Workforce Stability and Capacity Building

BUSINESS IMPACT DELIVERED

- The end-to-end approach by us resulted in considerable improvement in the deliverable processes.
- The CPA firm gained competitive edge in the market and was able to attract new clients and retain existing ones who were satisfied with the CPA firms service delivery
- This resulted in higher revenue per client and a greater opportunity for cross-selling and upselling services for the CPA firm.

ABOUT US

Valueonshore ("VOS") Advisors is a global business advisory firm of Big 4 alumni and industry leaders, supporting financial executives on complex, high-impact matters across accounting, M&A, risk, and managed services. Founded in 2009, the firm has grown to ~400 professionals across the U.S., India, and the UAE, serving mid-cap and high-growth companies as a trusted partner in navigating complexity and driving value.


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