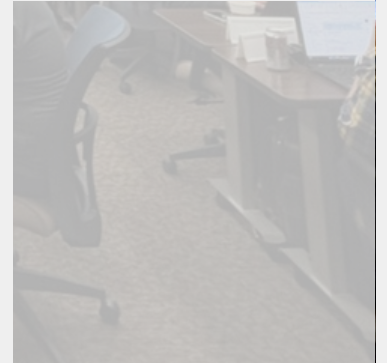
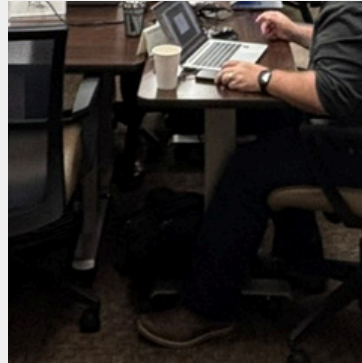
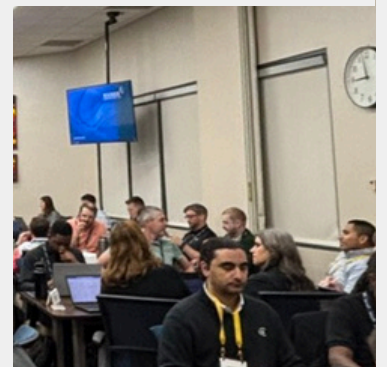
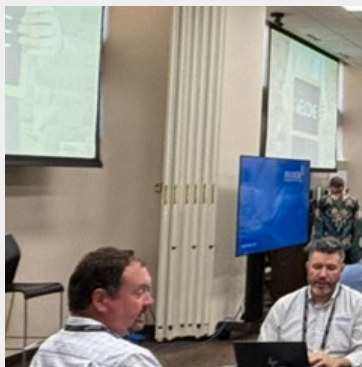


2026

Highlights from the

Boomer Technology Circles

Essential insights and takeaways from the latest Circle meeting that help your firm stay aligned, informed, and prepared for what comes next.



Topic Highlights from The Boomer Technology Circles 2026 Spring Meeting

The Boomer Technology Circles™ are technology-focused communities that bring together firm and IT leadership from peer accounting firms. Firms share knowledge, experiences, and insights to help one another make management and technology decisions. Members meet three times a year and benefit from access to top solution providers and influencers within the profession. Learn more at www.boomer.com/btc.

In May 2026, our Boomer Technology Circles met in Kansas City, Missouri. Below, we've summarized the top ten trends from the Fall 2025 Boomer Technology Circles meetings.

- **Trends for 2026**

- The five macro trends for 2026 frame the strategic pressures accounting firms are experiencing simultaneously.
- Our consultants led members through each trend, including AI-first culture, redesigning operating models for scale, profitability as execution quality, a fundamentally different talent system, and strategic choice as an ongoing discipline.

- **Evaluating New Tools and Applications in Practice**

- Every vendor now claims AI, but the gap between AI-wrapped products and purpose-built AI tools is widening, and choosing wrong is getting more expensive as integration complexity and data residency requirements grow.
- This session included a data-anchored roundtable using the 2026 BTC Technology Survey.

- **Automation Development Lifecycles and Best Practices**

- Building automations is becoming table stakes for competitive firms, but most do it without governance, creating fragile, undocumented workflows that create risk when the person who built them leaves.
- This session included a panel discussion with members sharing real-world examples. The session also introduced an Automation Prioritization Scoring Matrix, a weighted decision tool rating each candidate automation across business need, impact, strategic alignment, resource readiness, complexity, existing capability and quick-win potential.

- **Building a Flexible 3-Year IT Strategic Plan in a Rapidly Changing Firm**

- A 3-year IT plan that isn't anchored to the firm's business strategy is an expensive document that won't survive contact with reality. Yet most firms plan technology in isolation from firm direction.
- This session led members through a structured planning framework: starting with firm vision, reversing the chronology from 3-year destination back to Year 1 commitments, and using a Project Hopper scoring matrix to prioritize initiatives across seven criteria. The session emphasized balancing technical debt reduction against forward investment, as firms carrying significant legacy debt have less capacity to innovate.

- **Document Management and Retention Policies: What Accounting Firms are Really Doing**
 - AI makes the document retention problem more urgent. Every document you retain indefinitely is now searchable, surfaceable and potentially a liability.
 - This session included a facilitated discussion exposing the governance gap in most firms. IT has the tools but lacks authority. Risk and compliance write the policy, but don't enforce it. Practice leadership manages the exceptions. Members identified M&A as the single highest-risk moment. Each acquisition inherits conflicting retention schedules, unknown legal holds, and legacy systems that "temporarily" remain in place permanently. The firms making progress here have simple policies and technology that can actually enforce them.

- **Sponsor Highlights**
 - Staying current on emerging solutions is essential as accounting firms navigate new technologies.
 - During this session, our sponsors, HubSync, SysCloud, Netgain, Qount, Suralink, Inflo, Wolters Kluwer, and Beeye, provided focused updates on solutions addressing client experience, workflow automation, data protection, cloud infrastructure, scheduling, and secure document management, with Q&A following each presentation.

- **Applying the Least Rights Methodology to Content and Data**
 - Overly broad access permissions are a common precondition for both insider risk and ransomware propagation, and most firms have accumulated significant access debt over years of growth and acquisitions.
 - This session features a panel discussion with IT leaders from several firms, each describing their current state. The consensus is that legacy applications are where least privilege breaks down, and linking access to the scheduling system is the most promising path to making it automatic at scale.

- **Data Governance**
 - Firms running AI and automation on top of poorly governed data will get faster, more confident wrong answers, which is worse than getting no answers at all.
 - This session included a panel discussion covering practical data governance frameworks: defining data ownership by practice line, setting access and permissions standards and aligning governance practices with regulatory and client trust requirements. The discussion emphasized that effective data governance requires clarity on who owns what, documented standards that survive staff turnover, and technology that enforces policy rather than relying on human compliance.

- **Upskilling Inside the Firm: Lessons, Examples, and Emerging Practices**
 - The talent shortage makes hiring alone an insufficient strategy. Firms must build the capabilities they need from within.
 - This session presented a five-part framework: defining firm capabilities and necessary skills, redesigning roles and career pathways to move people toward higher-value contribution, embedding learning into daily work, building a culture of experimentation where failure is normalized and curiosity is treated as a strategic asset, and equipping managers to function as capability coaches rather than work supervisors.

- **Managing the Volume of Security Questionnaires from Clients**

- As clients like banks, healthcare organizations and large enterprises increase the scope and frequency of vendor security assessments, firms face a growing administrative burden that diverts security staff from substantive risk management work.
- During this Ask Your Peers discussion, members shared tactics including maintaining a standing security response repository that can be pointed to directly rather than answering question by question, using AI agents to match template responses to incoming questions and flag gaps for human review, and standardizing a firm-published security summary packet that clients receive proactively.

It's impossible to cover everything discussed at the last Boomer Technology Circles meetings in this summary. However, the trends described in this report offer insight into what is happening in the profession.

An Invitation to Participate in The Boomer Technology Circles™

The Boomer Circle Summit will take place August 16-19, 2026. To learn more about the Boomer Technology Circles communities, please visit <http://www.boomer.com/btc>.

About Boomer Consulting, Inc.

Boomer Consulting, Inc. provides consulting services to hundreds of the highest performing CPA firms. Our unique and powerful solutions target five areas critical to a firm's success: Leadership, Talent, Growth, Technology and Processes. For more information, visit www.boomer.com.