

Highlights from the

Boomer Marketing & BD Circle

Highlights from the Boomer Marketing & Business Development Circle™ – 2025 Fall Meeting

The Boomer Marketing & Business Development Circle™ is a community of marketing and business development professionals from forward-thinking firms who are committed to aligning marketing and business development initiatives with firm strategy. Learn more at

www.boomer.com/mbdc.

This October, members met at the Accounting Innovation Center in Kansas City, Missouri, to share knowledge and build relationships with peers. The discussions centered around the following topics.

- **Industry-Focused Growth: Aligning Strategy and Metrics for Measurable Success**
 - Firms that adopt an industry-focused go-to-market strategy strengthen differentiation, deepen relevance with clients and uncover new cross-service opportunities.
 - Tracking key metrics such as pipeline, win rates, revenue and ROI helps create alignment across teams and drives more focused, measurable growth initiatives.
- **Industry-Focused Growth: Turning Data Into Strategic Action**
 - Firms explored how leveraging industry data and trends can shape more targeted, effective strategic plans that drive sustainable growth within key sectors.
 - By aligning planning and execution, firms can build industry-specific go-to-market strategies that create stronger focus, measurable impact and long-term success.
- **Industry-Focused Growth: Real-World GTM Strategies that Deliver Results**
 - Firms shared go-to-market initiatives across industries and service lines, showcasing how tailored messaging, focused targeting and internal collaboration produced measurable growth outcomes.
 - Participants reflected on their own GTM efforts using a structured assessment to identify strengths, gaps and opportunities for both short-term wins and longer-term strategic plays.
- **Marketing & Business Development Exchange**
 - Firms shared real-world projects, from relationship-building programs and CRM integration to AI-powered social content and prospect re-engaging efforts, offering practical insights for marketing and business development alignment.
 - Participants exchanged best practices and lessons learned to address shared challenges, strengthen collaboration and adapt proven strategies to their own firm initiatives.

- **Sponsor Highlights**

- Thought leaders from Intapp, Instant IP and Mole Street shared insights on emerging trends in client experience, communication and accountability that are transforming firm operations.
- The session highlighted innovative tools and systems that support stronger collaboration, streamlined workflows and improved client engagement across the profession.

- **Boomer Updates**

- Boomer Consulting shared several updates designed to enhance member experience and communication.
- Members received updates on Circle renewals, new on-demand resources through the Boomer Knowledge Network and key dates for upcoming events like the 2026 Boomer Circle Summit and next year's Circle meetings.

- **Future Planning**

- We always want to ensure our Circle meetings address the topics our members want to hear about! To that end, we dedicate some time at the end of each meeting to collecting ideas for future topics.
- Some future topics discussed include client experience strategy and deeper conversations about what firms are doing with AI to streamline and gain efficiencies outside of content development.

It's impossible to cover everything we discussed at the Boomer Marketing and Business Development Circle in this short summary. However, the trends described in this report should give you some insight into the marketing and business development challenges and solutions that firms are thinking about today.

An Invitation to Participate in the Boomer Marketing and Business Development Circle™

To learn more about the Boomer Marketing and Business Development Circle community, please visit www.boomer.com/mbdc.

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