

Highlights from the

Boomer Process Circle

Highlights from the Boomer Process Circle™ 2025 Fall Meeting

The Boomer Process Circle™ is a community of the accounting profession's top lean and process leaders and champions within CPA firms. These leaders gather to collaborate and share leading-edge best practices in the areas of process improvement and innovation. Learn more at www.boomer.com/pc.

In October of 2025, Boomer Process Circle™ members met in Kansas City, Missouri, to share knowledge, discuss what the future holds for public accounting firms and build relationships with peers. The discussions centered around the following topics:

- **Centralization Trends and Departmental Shifts**
 - Our consultants led a discussion on how firms are balancing centralized and departmental ownership of essential processes like billing, scheduling and tax return verification as they scale operations.
 - Members examined when and why to centralize functions, weighing factors like complexity, firm size and cross-training requirements to improve efficiency and collaboration.
- **Evaluating Solution Providers and Building Effective Implementation Teams**
 - Members explored how to define clear internal requirements and ROI metrics before engaging technology or service providers to ensure each solution aligns with firm goals and workflows.
 - The discussion emphasized structured implementation teams, highlighting the importance of defined roles, cross-department collaboration and smooth hand-offs to operations for long-term success.
- **Member Connection Program Coming in 2026**
 - Boomer Consulting introduced the upcoming Member Connection Program, designed to transform networking from passive connections to active, intentional collaborations across the Process community.
 - Beginning in 2026, members will be paired based on shared goals, focus areas and complementary strengths, creating accountability and deeper peer partnerships that drive growth and innovation between meetings.
- **Boomer Insights: Building Transformational Teams**
 - Amanda Wilkie and Arianna Campbell shared the Transformation Triangle framework, emphasizing how alignment among leadership, process and people drives sustainable change across firms.
 - Members examined core roles in successful change initiatives, including sponsors, project managers, facilitators and cross-functional subject experts. We also discussed practical ways to structure teams for impact and accountability.
- **Process Circle Exchange: AI Edition**

- Members showcased firm projects focused on AI adoption and automation, sharing real-world examples, measurable outcomes and lessons learned from implementation.
- The discussion centered on best practices and peer-driven insights to help firms apply AI tools effectively, overcome challenges and enhance efficiency within their own operations.

- **Sponsor Highlights**

- Thought leaders from Bahwan CyberTek, Bill.com and Madras Accountancy shared insights on technology trends shaping client experience, communication and accountability across the accounting profession.
- Members engaged in an open Q&A to explore how these innovative solutions can streamline operations and strengthen collaboration within their firms.

- **Ask Your Peers**

- In this interactive, peer-led session, members collaborated to address real-time firm challenges, exchanging insights on process improvement, change management and innovation.
- The group focused on developing actionable solutions and prioritizing takeaways that members can implement immediately to improve firm performance and efficiency.

- **Take it Back Sharing**

- Members used the Take It Back tool to capture actionable ideas, next steps and strategies for applying insights gained throughout the meeting to their firm initiatives.
- By sharing commitments and fostering accountability within their peer groups, participants reinforced collaboration and ensured continued progress beyond the session.

As always, it's impossible to cover every detail of our great discussions and brainstorming sessions in this short, high-level summary. However, the topics mentioned in this report should give you some great insight into the challenges and solutions that the profession's Process leaders are thinking about today.

An Invitation to Participate in the Boomer Process Circle™

To learn more about the Boomer Process Circle community, please visit <https://www.boomer.com/pc>.

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