

Highlights from the

# Boomer Technology Circles

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## Topic Highlights from The Boomer Technology Circles 2025 Fall 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](http://www.boomer.com/btc).

In November 2025, 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.

- **Effective Communication Through Leadership Meetings**
  - How do firms structure leadership meetings to strengthen alignment and drive better decision-making?
  - This session examined how firms organize leadership meetings across functional areas, including technology, operations, HR, marketing and finance.
- **Applying Least Rights Methodology to Content and Data**
  - How can firms strengthen security and reduce risk by tightening access to content and data?
  - Members explored how limiting access to only what users need supports compliance, minimizes vulnerabilities and improves operational efficiency across platforms and workflows.
- **AI Solutions and Copilot Agents in Practice**
  - In this session, panelists shared real-world examples of how their firms are adopting AI solutions and Copilot agents to streamline processes, accelerate decision-making and improve productivity.
  - Live demonstrations highlighted practical use cases across professional services, along with lessons learned related to governance, risk management and staff adoption.
- **Sponsor Highlights**
  - During this session, thought leaders from our sponsoring vendors (Canopy, Inflo, Netgain, SafeSend, Suralink, Thomson Reuters, Wolters Kluwer and Zoho) shared insights on trends shaping client experience, communication, accountability and broader challenges facing the profession.
  - An open Q&A followed the presentations, allowing members to engage directly with providers to explore capabilities and opportunities for improved efficiency and client service.
- **Ask Your Peers Breakouts**
  - During this facilitated, peer-driven session, members exchanged real-time insights on issues ranging from AI risk evaluation to security frameworks, cloud transitions and vendor management.
  - Firms shared practical lessons learned and compared strategies for managing change, standardizing data, improving workflows and strengthening their technology environments.

- **Vendor Management Process and Best Practices**

- In this session, we explored why vendor management is an increasingly critical discipline for accounting firms as technology stacks expand and third-party dependencies grow.
- Members discussed the importance of assigning clear ownership, identifying a champion and defining who across the firm should be involved in vendor evaluation, onboarding and ongoing monitoring.

- **Tech-Enabled Efficiency**

- During the Ask Your Peers session, one member asked about specific technology changes that delivered measurable efficiency gains in the past year.
- Some examples shared by members include applying Lean Six Sigma principles to tax workflows, gaining leadership buy-in for a formal application request process, and activating onboarding capabilities within their ticketing system.

- **Best AI Prompt Training**

- During our Ask Your Peers session, members discussed the training tools and learning resources that have been most effective for building user confidence and improving prompt quality.
- Some resources mentioned include Mostly Serious and the Vyonf Prompt Library.

- **Moving Servers to Azure**

- During an Ask Your Peers session, a member asked peers who have moved servers to Azure whether they have any regrets or other feedback to share.
- Overall, sentiment leaned positive, with firms appreciating the reduced on-prem maintenance burden, improved scalability and the ability to shift responsibility to cloud providers.

- **Tech Our Members are Currently Exploring**

- During an Ask Your Peers session, a member asked about technologies their peers are currently exploring.
- The discussion reflected a broader trend across the profession as firms are experimenting with AI-enabled platforms, automating more internal workflows and evaluating tools that enhance security and productivity.

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 17 – 20, 2025. To learn more about the Boomer Technology Circles communities, please visit <http://www.boomer.com/btc>.

### **About Boomer Consulting, Inc.**

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