

Highlights from the

# Boomer CIO Circle

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## Topic Highlights from The Boomer CIO Circle™ 2025 Fall Meeting

The Boomer CIO Circle™ is a community of IT leaders from forward-thinking firms who are committed to aligning technology and strategy at the highest levels. Members focus on developing the skills necessary to improve leadership beyond technology. Learn more at [www.boomer.com](http://www.boomer.com).

This September, our members met in Portland, Maine. The discussions were lively and insightful as each member shared perspectives on the challenges and opportunities facing their firm and the profession.

- **Emerging Technologies and Hype Cycles**
  - This session covered the latest trends in accounting firms, including machine customers, AI agents, decision intelligence and programmable money from the Gartner Hype Cycle.
  - Members discussed adoption barriers like training, change management and ROI concerns while identifying which technologies are most likely to impact firms in the next 12-24 months.
  
- **Book Discussion**
  - Before the meeting, members were asked to read the book *Reset: How to Change What's Not Working* by Dan Heath.
  - Members reflected on how Heath's framework for diagnosing and addressing broken processes could apply within IT and firm-wide initiatives.
  
- **Sponsor Highlights: Suralink & Thomson Reuters**
  - Our sponsors, Suralink and Thomson Reuters, provided an overview of who they are and how they serve accounting firms.
  - Suralink shared updates on secure collaboration and workflow efficiency tools. Thomson Reuters highlighted new offerings and how they support accounting firms navigating compliance and efficiency challenges.
  
- **CIO Exchange/Accountability Review**
  - This roundtable allowed members to share their top three strategic projects,
  - Members shared what they're working on and lessons learned during the process and received feedback from other members.
  
- **Harnessing the Value of AI in Business**
  - Dan Koloski of The Roux Institute led a session on structured approaches to AI adoption, comparing today's AI moment to past inflection points like cloud and analytics.
  - He introduced a framework for evaluating AI opportunities and highlighted skills IT and business partners need to maximize value.

- **Innovation Workshop**

- This workshop focused on designing effective innovation processes within CPA firms.
- Members collaborated on defining what innovation means in their firms, how to intake and vet ideas, manage resources and build feedback loops.

It's impossible to cover everything that we discussed at the last Boomer CIO Circle meeting in this short summary. However, the trends described in this report should give you great insight into the technology challenges and solutions that firms are considering today.

**An Invitation to Participate in The Boomer CIO Circle™**

To learn more about the Boomer CIO Circle community, please visit [www.boomer.com/cio](http://www.boomer.com/cio).

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