

2026

Highlights from the

Boomer CIO Circle

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 CIO Circle™ 2026 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.

This September, our members met in Portland, Oregon. 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**
 - CIOs have to separate real disruption from vendor noise while every pitch promises AI and a wrong bet costs budget and credibility with firm leadership.
 - In this session, we compared the 2025 Emerging Technology Hype Cycle themes (machine customers, AI agents, decision intelligence, programmable money) with the 2026 themes, which include redistributing decisions among humans and autonomous machines and anchoring growth in human-centered trust, then walked through the 2026 Agentic AI Hype Cycle.
- **Book Discussion**
 - Before the meeting, members were asked to read the book *Primal Intelligence* by Angus Fletcher and come prepared to discuss.
 - Questions pushed CIOs to name the capacity their role gives them the least room to use, recall a call they got right without supporting data, and spot where a story would move leadership faster than a spreadsheet.
- **Sponsor Highlights**
 - CIOs make vendor decisions that shape a firm's technology stack for years, so hearing directly from solution providers helps them decide which ones deserve a closer look.
 - Aiwyn and Thomson Reuters each took a slot to present their solutions to the group.
- **CIO Exchange: Data Governance for a Successful AI Buildout**
 - Every firm wants AI in its workflows, but AI exposes each messy data set and loose permission it touches, and CIOs take on that risk that leaders outside IT rarely see.
 - This discussion landed on IT as facilitator and enabler, with business leaders owning their own data and leadership buy-in deciding whether the effort works.

- **CIO Exchange: Moving to New Client Collaboration Tools**
 - Clients may juggle a different portal for each service, and CIOs must pick a platform while vendors keep reshaping their products and promising integrations they don't fully deliver.
 - Members compared experiences consolidating multiple client-facing tools into a more unified experience, with discussion highlighting that changing client behavior may be a bigger challenge than changing the technology itself.
- **CIO Exchange: Vendor Pricing Models and AI Costs**
 - AI vendors are experimenting with pricing by seat, usage, agent and even percentage of firm revenue, and CIOs must commit budget to costs that could grow into a major share of technology spend.
 - Members split on revenue-based pricing. One liked that a fixed commitment pushes firm-wide adoption and holds business leaders accountable for ROI, while others called it offensive and asked why a vendor deserves a cut of growth it didn't drive.
- **The Influence Advantage, Part 1: The Language of Leadership**
 - CIOs bring sound ideas to leadership and still watch budgets tighten and proposals stall, because data alone rarely moves a room.
 - This session led members through building narratives that move people, telling the story behind the data and communicating clearly under pressure.
- **The Influence Advantage, Part 2: Influence Without the Title**
 - CIOs own initiatives that depend on people they don't control, including the Executive Committee, peers, vendors, and C-Suite colleagues who don't "speak IT."
 - Members worked through selling ideas, building credibility without role authority and what it takes to shift a room.

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.

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