

Highlights from the

Boomer Managing Partner Circle

Fall 2022

Highlights from the Managing Partner Circle™ — 2022 Fall Meeting

The Boomer Managing Partner Circle is a community of Managing Partners from around the country that get together twice a year to share knowledge and best practices and propel each other to higher levels of success. Learn more at www.boomer.com/mpc.

In August of 2022, our members met in Kansas City, Missouri, for lively and insightful sharing of their perspectives on the challenges and opportunities facing their firm and the profession. The discussions centered on the following topics:

- **The Future Focus/Lessons Learned**
 - This is an exciting year of transition for many firms with new initiatives, new projects and new people. Members took some time to think about accomplishments from the past six months in their personal and professional lives and projects and initiatives they're excited about today.
 - To get our meeting started on the right foot, we asked each member to share some great news from their firm with their peers.
- **Subscription Pricing and Packaging**
 - You've built your practice to offer all sorts of valuable services to clients: tax, accounting, assurance, advisory, consulting and likely many more.
 - In this session, we discussed how firms can elevate their thinking around pricing and packaging those services to move to a higher level of practice and service.
- **Managing by the Numbers: Best Practices**
 - Leaders need to identify which numbers they'll watch and how they'll use data mining and dashboards to automate what they'll be reviewing.
 - In this session, we discussed metrics, automation and best practices for locating, cleaning, and using data.
- **Managing Partner Exchange**
 - This is time we set aside for our members to ask their peers anything on their minds.
- **Managing Partner Show & Tell**
 - Before the meeting, we asked our members to bring an item, resource, project, marketing technology, etc., that they developed or used internally to share with the group.
- **5 Big Commitments**
 - We never want our members to leave without providing an opportunity to reflect on what they've learned and document their action plans.
 - Before adjourning, members shared their plans with their peers and share their commitments with the whole group.

As always, it's impossible to cover everything that we discussed at the last Boomer Managing Partner Circle meeting in a short summary. However, the trends and issues described in this report should give you some great insight into the challenges and solutions that managing partners are thinking about today.

An Invitation to Participate in The Boomer Managing Partner Circle™

To learn more about The Boomer Managing Partner Circle™ community, please visit <http://www.boomer.com/mpc>.

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