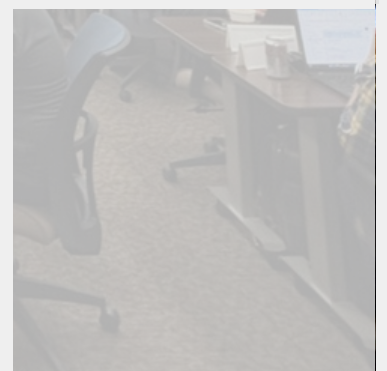
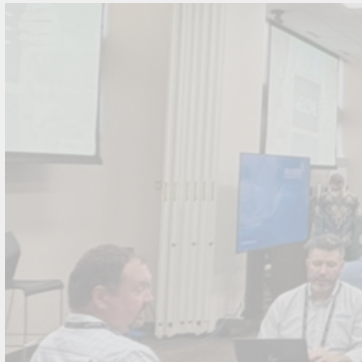


2026

Highlights from the

Boomer Audit Leader Circle

Essential insights and takeaways from the latest Circle meeting that help your firm stay aligned, informed, and prepared for what comes next.



Highlights from the Boomer Audit Leader Circle™ 2026 Spring Meeting

The Boomer Audit Leader Circle™ is a community of the accounting profession's top audit leaders within CPA firms. These leaders gather to collaborate and share leading-edge strategies in practice modernization and firm-wide alignment. Learn more at www.boomer.com/alcl.

In April of 2026, Boomer Audit Leader 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:

- **Trends for 2026**
 - As the accounting profession faces simultaneous shifts in technology, talent and client expectations, audit leaders who identify and act on emerging trends now will be better positioned to lead their firms through change rather than react to it.
 - In this session, we led members through five macro trends shaping the profession in the coming year, including the rise of AI-first culture and the growing imperative to redesign operating models for scale. The session included time for discussion and Q&A.
- **Changes to the Audit Process to Improve Efficiency**
 - Audit teams are under pressure to do more with the same or fewer resources, so improving efficiency is crucial.
 - During the Ask Your Peers session, members exchanged a range of approaches that have moved the needle in recent years, including adding dedicated project manager or client service coordinator roles to handle administrative tasks.
- **AI and Technology Are Rethinking the Audit. Are You?**
 - As AI and emerging technologies accelerate across the profession, audit leaders need to know how to leverage these tools strategically and lead their teams through the change.
 - In this session, members explored how firms are applying AI and emerging technologies to modernize audit workflows and expand capacity. The conversation covered where firms are making real progress, where challenges remain and what leadership considerations are critical for guiding teams through technology-driven change.
- **Charting the Course for a Successful Audit Leader Circle**
 - The value of a peer community depends on the quality of the group and the clarity of shared expectations. This session gave members a direct role in shaping both.

- In this facilitated discussion, members defined criteria for group membership, identified the determinants of success for the Circle, and introduced the Circle Exchange format members can expect at the Fall meeting.
- **Developing Next-Gen Audit Leaders**
 - With the profession facing ongoing talent pressure and a rapidly changing practice environment, building a strong leadership pipeline is a strategic priority for every audit practice.
 - Members shared how their firms develop high-performing audit professionals and accelerate staff readiness. The discussion covered practical strategies for building leadership capacity and creating a sustainable talent pipeline that can meet the demands of a modern audit practice.
- **Sponsor Highlights**
 - Audit leaders must stay current on the latest solutions to improve the client experience, strengthen communication and drive accountability across their practices.
 - During this session, members heard from thought leaders at Basis and Wolters Kluwer on trends and innovations addressing challenges in the profession. The session opened the floor for Q&A, allowing members to explore how these solutions can support their firms' evolving audit strategies.
- **How Firms Use AI to Review Workpapers**
 - As AI tools become more accessible, audit leaders are exploring how to apply them at the workpaper level, where even small improvements in review quality and speed can have a big impact on engagement timelines and realization.
 - During the Ask Your Peers session, members shared a range of current approaches, including exporting workpapers into ChatGPT Enterprise or Microsoft Copilot to generate staff-friendly review notes and using AI to analyze internal control documents and draft workpapers for each transaction cycle.
- **Scheduling Software and Efficiency**
 - Staffing and scheduling directly affect utilization, realization and the ability to proactively manage capacity, making it a persistent pain point for audit leaders trying to balance workloads across teams and engagement.
 - During this Ask Your Peers discussion, members shared a range of approaches, from Excel-based schedules managed by a centralized scheduling team to dedicated tools. Several firms noted that centralized scheduling (putting one person or team in control of the schedule) was the key to making any approach work.

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 in this report should give you valuable insight into the challenges and solutions that the profession's audit leaders are considering today.

An Invitation to Participate in the Boomer Audit Leader Circle™

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

About Boomer Consulting, Inc.

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