

Highlights from the

Boomer Operations Circle

Topic Highlights from The Boomer Operations Circle™ 2025 Spring Meeting

The Boomer Operations Circle™ is a community of operational leaders from forward-thinking firms who are committed to designing and implementing better business strategies, plans and procedures in their firms. Learn more at www.boomer.com/oc.

This March, our members gathered in Kansas City, MO, for a lively and insightful exchange of perspectives on the challenges and opportunities facing their firm and the profession.

- **Leveraging Non-Traditional Staff for Firm Success**
 - Forward-thinking firms are redefining their teams by embracing non-traditional roles, including paraprofessionals, project managers, and technology partnerships.
 - This panel discussion showcased real-life examples from firms that are capitalizing on these evolving roles to drive innovation and efficiency.

- **2025 Trends**
 - The Boomer consultants provided an update on the latest trends expected to shape the accounting profession in the coming year.
 - Some of the trends discussed include the need to adapt and leverage or become obsolete and capitalizing on the opportunity to evolve.

- **Future-Proofing Your Firm: Initiatives and Strategies for Growth**
 - In this facilitated conversation and hands-on workshop, members tackled the challenges of capacity, skills development, and team adaptability.
 - The session featured insights from Samantha Dye, who shared her expertise on creating an M&A Playbook.

- **Sponsor Highlights**
 - Identifying new solutions and systems is a big part of the success of our firms.
 - In this session, we heard from thought leaders from Aiwyn and Netgain about trends related to client experience, communication, accountability, and other challenges facing the profession. Following a brief presentation, sponsors opened the floor to questions and answers.

- **Operations Exchange**
 - Prior to the meeting, we asked members to present a project they've implemented in their firms.
 - Some of the projects or tools discussed included one firm that is completely changing its business model to focus on leveraging AI to help clients become profitable and another firm's new project management tool.

- **Building Accountability and Engagement**
 - To be successful, firm leaders need to create actionable accountability frameworks, enhance employee engagement, and break down organizational silos.

- During this session, participants collaborated to design functional leadership structures, identify barriers to accountability, and craft strategies for retention and mentorship. Members walked away with a clear plan to drive accountability and foster a thriving workplace culture.
- **Mentorship Program**
 - During our Ask Your Peers session, some of our members discussed how their firms handle mentorship programs.
 - The discussion included comparing mentorship to coaching and best practices for structuring the program.
- **Documenting Firm Processes**
 - During our Ask Your Peers session, members discussed the software or processes their peers use to document all of the firm's processes.
 - Some of the solutions discussed include Visio, Continuous Improvement Manager, Loom.com/ai, and Colosian.
- **Take-It Back Sharing**
 - Personal planning time is a crucial component of our peer community meetings.
 - During this session, members had time to reflect on what they learned at the meeting and what actions they want to take over the next six months. Members met in small break-out groups to discuss their commitments.

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

An Invitation to Participate in The Boomer Operations Circle™

To learn more about the Boomer Operations Circle community, please visit www.boomer.com/OC.

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