

Highlights from the

Boomer Process Circle

Summit 2022

Topic Highlights from The Boomer Process Circle Summit Meeting

The Boomer Process Circle™ is a community of the accounting profession's top lean and process leaders and champions within CPA firms. These leaders gather to collaborate and share leading-edge best practices in the areas of process improvement and innovation. Learn more at www.boomer.com/pc.

In August of 2022, our Boomer Process Circle™ members met in Kansas City, Missouri, for our annual Summit to share knowledge, discuss what the future holds for public accounting firms and build relationships with peers. Below, we've summarized the discussions centered around the following topics:

- **Project 40**
 - Everyone is trying to do more with the same amount of time and leverage their time to its best and highest use. Working through how can we get more time back and balance our work and home lives?
 - Earl Blackmon gave an update on his firm's "Project 40" and the outcome of the removal of timesheets.
- **Automation of Client & Employee Onboarding Processes**
 - Current talent acquisition challenges have most firms looking to outsourcing as a way to improve turnaround time, increase profits and provide partners and staff a more balanced lifestyle during the traditional busy season.
 - In this session, we'll talk about what outsourcing is and what it isn't, and we'll take a look at the many types of "resourcing" available.
- **The Boomer Briefing**
 - During an interactive panel discussion, our consultants answered questions from a pre-meeting survey of members about the latest trends, growth strategies and opportunities in the accounting profession.
- **A View from the Boardroom**
 - Customer engagement, economic uncertainty, the competitive landscape, transformation and diversity, equity, and inclusion dominate boardroom discussions today.
 - Keynote speaker Kimberly Ellison-Taylor discussed what looking around the corner on these issues really means and how inclusive leadership can improve engagement.
- **Imagineering the Workplace of 2030**
 - Imagineering the Workplace of 2030 can seem over-whelming.
 - In this session, we discussed specific actions you can take in talent, technology and innovation to ensure that your firm is protecting the current company while building a future company that will be amazing.
- **Change Leadership**
 - In our changing world, leadership requires that we push through the fear and uncertainty and look for opportunity.

- In this session, we identified specific steps our members can take to capitalize on the changes they're leading through right now.
- **Sponsor Sessions**
 - Our sponsors hosted a variety of breakfast, lunch, special sessions and showcases our members could choose from, including:
 - **Intuit:** Create Your Path to Advisory Services Through Integration and Automation
 - **Sureprep:** Alleviating Staffing Concerns by Leveraging Automation with Outsourcing
 - **Diligence:** Power the Digital Firm with the Diligence Cloud
 - **Thomson Reuters:** Bring APIs to Life: Converting Theory Into Practical Use
 - **Wolters Kluwer:** Fostering a Culture of Innovation with Technology

Thank you to our Platinum Sponsors: Netgain, Sage, Thomson Reuters and Wolters Kluwer and our Gold Sponsors: Aiwyn, Botkeeper, Cetrom, Intuit, Pax8 and Suralink. You can check out our other sponsors at <https://www.boomer.com/sponsors-btc>.

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 mentioned in this report should give you some great insight into the challenges and solutions that the profession's Process leaders are thinking about today.

An Invitation to Participate in The Boomer Process Circles™

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

About Boomer Consulting, Inc.

Boomer Consulting, Inc. provides consulting services to hundreds of the highest-performing CPA firms. Our unique and powerful solutions target five areas critical to a firm's success: Leadership, Talent, Growth, Technology and Processes. For more information, visit www.boomer.com.