

Highlights from the

# Boomer CIO Circles

---

Fall 2023

## Topic Highlights from The Boomer CIO Circle™ 2023 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](http://www.boomer.com).

In September, our members met in Long Beach, California. As always, 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 Circles**
  - This session covered the latest trends in accounting firms focused on disruptive technologies that are set to make a significant impact on the profession.
  - The four trends discussed in this session are Emergent AI, Developer Experience (DevX), Pervasive Cloud and Human-Centric Security/Privacy.
- **Book Discussion**
  - Before the meeting, members were asked to read the book *Digital Body Language* by Erica Dhawan.
  - Members discussed the book, including how digital body language differs from traditional body language, generational differences, and where they see opportunities to apply the lessons from the book.
- **Marketing Workshop**
  - The role of CIO extends much further than keeping the firm's technology systems running. Establishing IT as a strategic asset of the firm requires effective communication and influence at various levels.
  - In this interactive workshop, members learned how to differentiate influence and authority and leverage both, demonstrate how to create thought leadership and create strategies to leverage partners throughout the firm to support these efforts.
- **Sponsor Overview**
  - Members had a chance to hear from our sponsor, Inflo, about how they're helping firms solve challenges with their current platform capabilities.
  - After a short presentation, members had the opportunity to ask questions and provide feedback on the long-term needs of the profession.
- **CIO Exchange/Accountability Review**
  - During an interactive roundtable discussion, members shared their top three strategic projects and best practices from real-world experiences.
  - Some of the projects discussed include data warehousing, growing offshoring, and international travel processes and restrictions.
- **Automation**

- Many of our members are working on growing automation in their firms.
- During our CIO exchange session, some of the automation opportunities members discussed included e-filing, lead collection tracking, client onboarding and offboarding.
- **Data strategy**
  - Accounting firms are sitting on treasure troves of client data, and many of our CIOs are looking for ways to clean and leverage it.
  - During our CIO exchange session, several members mentioned what they're working on in the data strategy area, including data warehousing and data governance.

It's impossible to cover everything discussed at the last Boomer CIO Circle meeting in this short summary. However, the trends described in this report should give you some great insight into the technology challenges and solutions that firms are thinking about 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](http://www.boomer.com/CIO).

### **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](http://www.boomer.com).