

Highlights from the

BOOMER PROCESS CIRCLE



2024



Highlights from the Boomer Process Circle™ 2024 Spring 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 May of 2024, Boomer Process 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 Update**
 - Each year, we look at the trends all firms should consider and plan for in the year ahead.
 - Our consultants shared their research on the hot topics forward-thinking firms should have on their radar today, including artificial intelligence, the transformation triangle, the evolution of the business model, navigating the capability puzzle, ideation and experimentation
- **Unifying Client Service**
 - This facilitated discussion invited members to delve into the intricacies of seamlessly integrating services while ensuring a unified client experience.
 - From aligning communication strategies to streamlining engagement management, we discussed practical approaches to enhance client satisfaction and drive internal collaboration.
- **Exploring Outsourcing Strategies for Your Firm**
 - This facilitated discussion explored the various approaches, challenges, and benefits of outsourcing in accounting.
 - Strategies discussed include leveraging specialized expertise to manage risks and optimizing operational efficiency.
- **Navigating Change: Assessing Organizational Readiness**
 - Organizational readiness is crucial for effective change management.
 - In this session, we explored factors contributing to a company's preparedness to adapt, innovate, and successfully navigate transformative processes.
- **Positive mindset**
 - Mindset is a huge component of the Boomer Process Circle.
 - During our Positive Mindset, our members look at what they've accomplished and share progress toward their goals since the last meeting.
- **Sponsor Innovation Sessions**
 - Members had a chance to attend a session hosted by our sponsor, Suralink.
 - Suralink shared the new features and innovations still to come in 2024, including partnerships and integrations with other solution providers.

- **Open Q&A**
 - During this part of our meeting, members have a chance to lay it all out on the table and ask their peers anything on their minds.
 - Members posed questions on Conferences IO and voted on the ones they wanted to discuss further.

- **Take it Back Sharing**
 - We never want our members to leave without providing an opportunity to reflect on what they've learned and document their action plans.
 - Members broke out into small groups to share their plans with peers and discuss major projects for the coming quarter.

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 Circle™

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