BOOMER
CONSULTING, INC.

Highlights from the

CAAS Circle

Fall 2023

Highlights from the Boomer CAAS Circle™ - 2023 Fall Meeting

The Boomer CAAS Circle™ is a community of advisory services leaders helping one another develop the mindset, skillset and toolset for growing advisory services in their firms. Learn more at https://www.boomer.com/caasc.

In September 2023, Boomer CAAS Circle™ members met in Kansas City, Missouri, for lively and insightful sharing of their perspectives on the challenges and opportunities inherent in transforming their firms. The discussions centered on the following topics.

- **Workflow & Tracking Capacity**
  - Whether you're a team leader, project manager, or individual contributor, understanding and optimizing workflow and tracking capacity is crucial for successful project execution and meeting organizational goals.
  - During a group discussion, members explored the concepts of workflow and tracking capacity, focusing on how these practices can improve efficiency, productivity and overall performance.

- **The CAS Practice Workshop – Building a Transformative Future!**
  - A clear vision is essential for leading a CAS practice.
  - In this workshop, members met in small groups to discuss what they could do to take a "leap" into the future and make the next year your best ever.

- **Sponsor Highlights**
  - One of the benefits of our Circle communities is access to the top solution providers in our profession.
  - During this session, members heard from our three sponsors, Sage, CPA.com, and Intuit. After a brief presentation, members could ask questions and get answers to their most pressing questions.

- **Podcast Recommendations**
  - Our members are always looking for ways to stay on top of thought leadership and other developments in the profession, and podcasts are an engaging and convenient way to do just that.
  - During our Digital Transformation roundtable, members shared some podcasts they enjoy listening to, including the Accounting Podcast, the Boomer Briefing Podcast and the AICPA's Town Hall podcast.

- **Policies and Guidelines for Chat GPT Use**
  - ChatGPT and other generative AI tools are quickly transforming how we work, but there are privacy, security and legal concerns to be aware of.

- Members discussed whether their firms have policies or guidelines for using ChatGPT and other generative AI platforms and how they use these tools today. Some ideas members shared include composing emails, creating meeting agendas and job descriptions and even drafting AI policies!

- **Automating CAS Processes**
  - Our members are always interested in hearing about what their peers are automating.
  - During our Digital Transformation roundtable, members discussed the tools they're using to automate CAS processes. Some technologies discussed include Botkeeper, QuickBooks Online and GoProposal.

- **Software for Leveraging Advisory Services**
  - Offering advisory services requires different tools than traditional tax and audit solutions. During our Business Transformation roundtable, members discussed the tools they use for delivering advisory services.
  - Some tools discussed include Jirav, Reach Reporting, Digits, and Maus.

- **Characteristics of the Ideal CAS Team Member**
  - The skills needed for successful CAS team members often differ from those required for tax and audit team members. During the Business Transformation roundtable, one member asked about the typical or ideal characteristics CAS members should possess.
  - Some of the characteristics identified by their peers include being able to handle difficult conversations, being proactive, having curiosity, communication skills, being humble, and being capable of building relationships.

An Invitation to Participate in the Boomer CAAS Circle^{TM}

To learn more about the CAAS Circle community, please visit https://www.boomer.com/caasc.

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