INSIDE THE PROCESS CIRCLE

FALL 2026



The Growing Challenge of Managing Change and Capacity

Process leaders are navigating competing initiatives, evolving technology and growing pressure to make better use of firm resources. The focus is shifting toward building processes people can adopt, sustaining improvements beyond implementation and connecting operational decisions across the firm.

SIGNALS FROM THE ROOM

SIGNAL 1 Change Capacity Is Becoming a Strategic Constraint

Firms are managing multiple initiatives that often affect the same employees. Change fatigue is making it harder to sustain adoption, even when improvements are needed. Process leaders are recognizing that prioritizing and sequencing change matters as much as managing individual projects.

SIGNAL 2 Successful Implementation Requires More Than a Project Plan

Completing a technology rollout or process redesign doesn't guarantee people will work differently. The challenge is shifting from delivering projects on time to building awareness, commitment, ability and reinforcement so new processes become part of everyday operations.

SIGNAL 3 Resource Management Is Moving Beyond Scheduling

Assigning hours to a calendar isn't enough to manage tax workloads effectively. Firms need greater visibility into skills, capacity, work readiness and competing commitments. Connecting resource planning with workflow and operational decisions is becoming essential to improving delivery and accountability.

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3 THINGS AUDIT LEADERS ARE TESTING

- **Change Readiness Assessments**
  Applying the ADKAR framework to active initiatives to identify adoption barriers and develop targeted actions instead of relying on additional training alone.
- **Automated Engagement Workflows**
  Building standardized pricing, approval and engagement letter processes, including a member firm's internally developed workflow connecting contract generation with Power Automate and DocuSign.
- **Centralized Operational Processes**
  Working toward consistent client onboarding, engagement management and billing workflows to reduce variations in how work moves through the firm.

WHAT WE'RE HEARING

Initiative Overload Has an Operational Cost
When the same people are repeatedly affected by change, even worthwhile improvements can compete for limited capacity.

Go-Live Is Not the Finish Line
The real measure of implementation success is whether employees consistently use the new process after the initial rollout.

Resource Visibility Requires Cross-Functional Alignment
Tax leaders, operations, finance and resource management may see different symptoms of the same workflow problem, making shared information and accountability increasingly important.

TAKE IT BACK TO YOUR FIRM

Where is change fatigue affecting our ability to execute? Which initiatives compete for the same people, and what should we prioritize, delay or stop?

How are we measuring whether process improvements actually stick? What happens after implementation to reinforce adoption and prevent employees from returning to old workflows?

Do our resource management decisions reflect how work actually moves through the firm? Where could better coordination between tax leadership, operations and resource management improve capacity and delivery?

CONNECT THE DOTS

Process leaders are being asked to do more than improve individual workflows. They're helping firms determine which changes matter, how to make them sustainable and where better coordination can unlock capacity.

Inside the Boomer Process Circle, leaders compare real implementation challenges, share approaches they're putting into practice and pressure-test decisions with peers facing similar demands.

How is your firm turning process improvement into lasting operational change?

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