



Highlights from the

Boomer Technology Circles

Fall 2023

Topic Highlights from The Boomer Technology Circles 2023 Fall Meeting

The Boomer Technology Circles™ are technology-focused communities that bring together firm and IT leadership from peer accounting firms. Firms share knowledge, experiences and insights to help one another with management and technology decisions. Members meet three times a year and benefit from access to top solution providers and influencers within the profession. Learn more at www.boomer.com/btc.

In November of 2023, our Boomer Technology Circles met in Kansas City, Missouri. Below, we've summarized the top ten trends from the Fall 2023 Boomer Technology Circles meetings.

- **What's in Marc's Bag?**
 - What are the latest tools and technologies making the life of a road warrior a little easier?
 - In this session, Marc Staut shares some practical and mobile technologies he recommends to support and empower employees, including travel monitors, a keyboard for iPads, headphones and microphones.
- **Balancing Act: Outsourcing vs. Automating**
 - Outsourcing and automation can transform your firm's efficiency, profitability and client satisfaction.
 - In this session, we examined the benefits and drawbacks of outsourcing and automation in an accounting firm, providing practical insights, real-world examples, and actionable guidance to help members make informed choices for their firms.
- **Auditing IT Policies and Procedures**
 - In today's interconnected world, where technology is deeply embedded in operations, we face unique challenges and opportunities.
 - In this session, we explored the crucial role of IT policies and procedures in a modern auditing practice.
- **Evolving Workspaces: Redefining the Modern Office**
 - The modern workplace is undergoing a profound transformation, driven by technological advances, changing employee expectations, and the need for adaptability in an ever-evolving world.
 - During a facilitated group discussion, we explored the dynamic shift in how and where work gets done, hoteling solutions, conference room technology, and more.
- **Resource Management Beyond Scheduling Software**
 - Every firm is looking for the magic formula to ensure it has the right person in the right place at the right time.
 - During this session, we looked at overall strategies and metrics for resource management. Members also broke out into small groups to discuss how they handle resource management in their firms.

- **Changing in Team & Structure to Reflect Changes in the Profession**
 - In an era of rapid technological advancements, shifting landscapes, and changing client expectations, the need to adapt organizational structures and team dynamics has never been more critical.
 - During an insightful panel discussion, members considered how they're reimagining their teams and organizational structures to stay ahead.
- **Use Cases for AI in the Practice Areas and the Firm as a Whole**
 - Everyone wants to get beyond the hype surrounding AI to discover practical uses in their work.
 - In this session, Carl Tiede from Abdo provided valuable insights into the tangible and exciting use cases that AI brings to the forefront of innovation.
- **Addressing Generational Differences in the Workplace**
 - In today's firms, the workplace isn't just multigenerational—it's a dynamic blend of experiences, perspectives and work styles.
 - In this session, we addressed generational differences to foster collaboration, innovation and success within your firm.
- **"Outside the Box" IT Hiring**
 - During a firm management breakout session, members discussed whether they've hired new IT professionals this year and whether any of those hires were "outside the box."
 - Some IT hiring stories members discussed include hiring a help desk person with A+ certification, an automation engineer, and someone from operations to help with change/adoption management.
- **Looking Forward to 2024**
 - During our breakout sessions, we asked our members what they look forward to implementing in 2024.
 - Some initiatives our members discussed include SafeSend, SurePrep, offshoring, a new scheduling planner, and more.

It's impossible to cover everything discussed at the last Boomer Technology Circles meetings in this short summary. However, the trends described in this report should give you some great insight into what is happening in the profession.

An Invitation to Participate in The Boomer Technology Circles™

Our Boomer Technology Circles Spring Meetings will take place May 14 – 17, 2024. To learn more about the Boomer Technology Circles communities, please visit <http://www.boomer.com/btc>.

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Leadership, Talent, Growth, Technology and Processes. For more information, visit www.boomer.com.