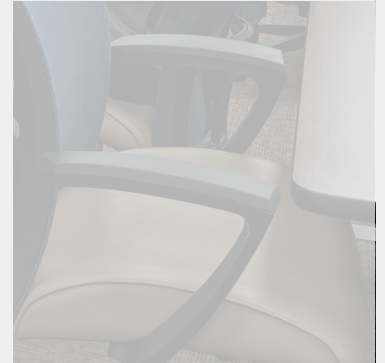
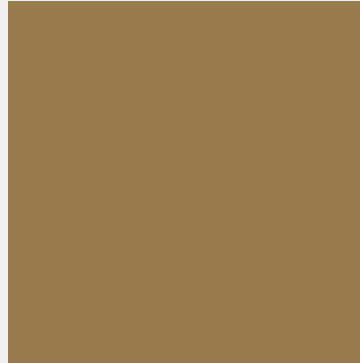
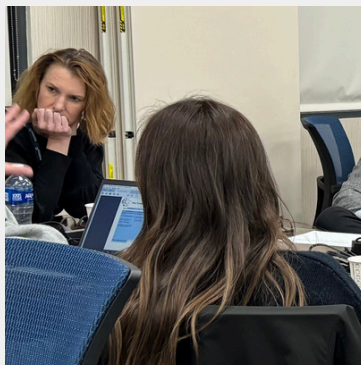


2026

Highlights from the

Boomer Operations Circle

Essential insights and takeaways from the latest Circle meeting that help your firm stay aligned, informed, and prepared for what comes next.



Topic Highlights from The Boomer Operations Circle™ 2026 Fall Meetings

The Boomer Operations Circles™ bring together operations leaders from forward-thinking accounting firms who are committed to developing and implementing stronger business strategies, processes and operational practices. Learn more at www.boomer.com/oc.

In October 2026, Operations Circle members gathered in Kansas City, Missouri, to share perspectives, discuss challenges and explore practical approaches to improving firm operations and preparing for the future.

Measuring Success Beyond Billable Hours

- As technology and AI help firms complete work more efficiently, traditional time-based pricing and performance measures may no longer reflect the full value being delivered. Operations leaders are exploring alternative metrics to better evaluate profitability, performance and client value.
- A panel of firm operations leaders shared different approaches to moving beyond traditional billable-hour measures. One firm is working to eliminate timesheets, another is moving away from using charge hours to forecast revenue while retaining time data for profitability analysis, and a third has begun changing its approach within CAS. Members also explored subscription billing for clients receiving ongoing services throughout the year.

Boomer Briefing

- Five macro trends are affecting operations leaders right now, and firms that treat all five as equal priorities risk executing none of them.
- Members revisited five trends shaping the profession in 2026: AI-first cultures, redesigned operating models, profitability as a measure of execution, evolving talent systems and strategic decision-making. Members voted on which trends would have the greatest impact, with the need for a different talent system receiving the most votes, followed closely by AI. Small group discussions explored changing entry-level roles, developing employees' ability to review AI-generated work and managing change fatigue.

Contribution Margin in a Non-Billable-Hour World

- As firms move away from traditional billable-hour measures, operations leaders still need reliable ways to evaluate profitability across service lines and engagements. The challenge is identifying meaningful financial measures without relying entirely on time-based data.
- Members discussed practical approaches to calculating contribution margin, including allocating shared personnel costs using consistent assumptions rather than pursuing perfect precision. One firm shared how it evaluates revenue against personnel expenses, benefits and software costs associated with each service line. The discussion also highlighted how profitability data can inform staffing and technology investments, while recognizing the value of recurring revenue from services such as CAS.

Sponsor Highlights

- Evaluating technology solutions is an important part of improving firm operations. Hearing directly from solution providers helps operations leaders better understand tools that can strengthen client collaboration, streamline processes and support firmwide efficiency.
- Representatives from Trust, Suralink and Cetrom shared insights into their solutions and how firms can address operational and technology challenges, followed by an opportunity for member questions.

Operations Circle Exchange

- As firms expand their use of AI, operations leaders are looking for ways to move beyond individual experimentation toward practical applications that can be shared across teams. Peer examples help firms identify opportunities, evaluate challenges and develop more consistent approaches to adoption.
- One member shared how his firm is using ChatGPT to develop logic for matching payments to client records during a lockbox transition. He also demonstrated how AI can help turn historical support emails into searchable knowledge resources and support reporting and presentations. Members exchanged additional use cases, including reporting, communications and internal AI governance, while exploring ways to share successful applications more broadly across their firms.

Client Onboarding Workflow

- Onboarding is where sales, scope, billing and data quality meet. A bypassed step shows up later as bad addresses, missing engagement letters and invisible pipeline.
- One firm shared how it uses Freshservice tickets to standardize new client onboarding, including required information and management approvals. Members explored how onboarding connects with CRM records, statements of work and billing processes. The discussion also highlighted challenges when team members bypass required steps and the importance of establishing clear ownership to ensure consistent adoption.

Engagement Letter Platforms

- Inconsistent engagement letters create liability and version-control problems, but audit teams in particular resist standardizing.
- Aiwyn dominated the room. Several members have used it for years or are moving to it. Members traded tactics for handling audit's many variations, including a standard letter with appendices for variations and an evergreen MSA paired with an annual SOW.

Driving Accountability Across the Firm

- Strategy only leads to results when someone owns each initiative. Firms often hold team members accountable while partners sit outside that structure.
- In this session, we walked through clarity, ownership, measurement and follow-through. Members shared examples and success metrics.

Getting Tax Clients to Send Documents on Time

- Delays in receiving client tax documents create scheduling challenges, increase pressure during busy season and make it more difficult for firms to manage workloads efficiently.
- Firms swapped deadline tactics, including automatic extensions after a certain cutoff and reminders through newsletters, texts and SafeSend. One firm said it took two to three years to retrain clients. Others charged a retainer to late clients, requested up-front payment from clients who showed up in January with a stack of documents, or offered early-filing discounts.

Career Development and Advancement Strategies

- As traditional career paths evolve, firms are looking for ways to provide meaningful development and advancement opportunities beyond partnership. Clear expectations and competency-based development can help employees understand their growth opportunities and prepare for future responsibilities.
- Members explored approaches to defining competencies across career levels, updating job descriptions and connecting performance evaluations with professional development. The discussion also addressed how firms can motivate and retain high-performing employees when traditional advancement opportunities are limited.

These highlights represent just a portion of the conversations taking place within the Boomer Operations Circles. Through peer collaboration and practical examples, members gain new perspectives on the challenges facing their firms and explore strategies to strengthen operations, improve performance and support sustainable growth.

An Invitation to Participate in The Boomer Operations Circle™

The Boomer Operations Circle connects operations leaders from forward-thinking accounting firms to exchange ideas, share experiences and work through the challenges shaping firm operations.

Learn more about the community and opportunities to participate at www.boomer.com/oc.

About Boomer Consulting, Inc.

Boomer Consulting, Inc. provides consulting services to hundreds of high-performing CPA firms. Our solutions focus on five areas critical to firm success: Leadership, Talent, Growth, Technology and Process. For more information, visit www.boomer.com.