



INSIDE THE TECHNOLOGY CIRCLES TRENDS

A Look Inside the Technology Circles

This resource offers a behind-the-scenes look at how members of the Boomer Technology Circles tackle an operationally-loaded decision: consolidating the firm's document management systems into a unified platform without disrupting the workflows their service lines depend on every day.

The moment that triggers the conversation

Does any of this sound familiar?

"Audit is moving to one system, tax wants something else, and CAS has its own binder tool. None of them talks to each other. I'm the one stuck in the middle."

"We have document management in three different places, depending on which department you ask. I need one layer that ties it all together, but I don't want to fight every service line to get there."

"We know we need a single source of truth for permanent documents. The problem is getting there without breaking the workflows people already depend on."

These are the kinds of questions technology leaders brought to the table at a recent Boomer Technology Circle meeting. The firms in the room ranged from regional practices to large multi-service-line organizations. Some were already using a unified DMS. Some were mid-transition. A few were still mapping out the problem. Nobody had a perfect answer. But the group used each other's experience to sharpen their thinking. They left with more insight into the decision requirements and who needs to own it.

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What's changing: Trends Circle members are reacting to

Firm management and technology leaders in the Boomer Technology Circles lead in a profession where data infrastructure is being rebuilt in real time. These are the signals they're seeing.

Fragmented document systems are a strategic liability

AI agents, data lakes, and firm-wide analytics require a coherent document foundation. Firms running three or four separate DMS tools by service line can't feed those systems without building expensive middleware or accepting that their data strategy will always be fragmented.

The line between accounting-specific and general-purpose tools is blurring

More firms are evaluating DMS platforms outside the accounting profession. Some are finding better retention controls, workflow automation, and integration capabilities in general-purpose cloud tools. Others discover the trade-offs around accounting-specific metadata and service line workflows are harder to navigate than they expected.

Automation is raising the bar for what "good" document management means

The benchmark is a moving target. A system that requires staff to manually file, locate, or transfer documents is being left behind. Leaders of forward-thinking firms are designing systems in which documents route and classify themselves with human intervention as the exception rather than the rule.

Executive sponsorship determines whether consolidation succeeds or stalls

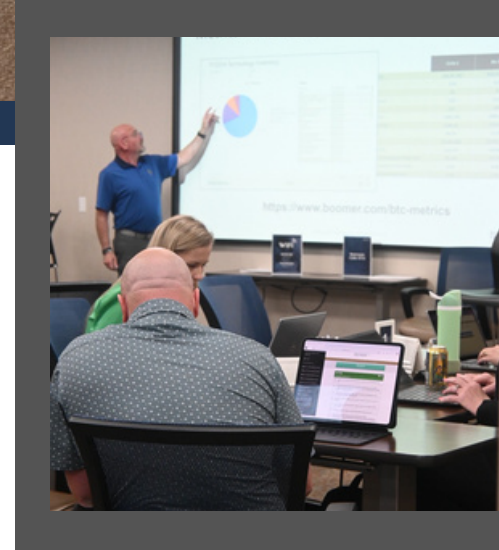
IT-led DMS initiatives without business-side ownership rarely reach full adoption. Having an executive sponsor accountable for driving adoption across service lines, not just a technology mandate handed down from IT, is a real advantage.

Why firms are reevaluating their technology investments

Circle members don't jump to solutions. When this question came up, members used questions like these to sharpen their thinking before making a decision.

- What is the DMS meant to do? Define its purpose before choosing a solution.
- Where do integrations break down? Identify systems and manual handoffs that create friction.
- Who owns the change? Adoption requires a committed business sponsor, not just IT.
- What happens to existing data? Success depends on a clean, accessible migration.

These questions don't have universal answers. But they're lenses for examining where your firm is versus where you assume it is.





Why this works better in a peer community

Firm technology leaders can read vendor guides and analyst reports anywhere. What they can't replicate is the peer pressure test. Inside a Circle community, members challenge assumptions, share what's actually working, and learn from firms facing similar technology and operational realities. The conversations go beyond software features to uncover the process, governance, and adoption challenges that determine long-term success. They leave with practical next steps, trusted peer relationships, and accountability that extends beyond the meeting itself.

See how the conversation unfolds

This is how the Boomer Technology Circles work. Members don't just get frameworks and vendor pitches. They take part in conversations with peers who run firms at a similar scale, face the same operational complexity, and ask the same hard questions. These conversations help them make better decisions, faster.

[Join us in the Technology Circles.](https://boomer.com/btc)



What strong technology leaders do differently

Several patterns emerge among firms making real progress in this area:

1. **They define the use case first.** They determine what belongs in a permanent record versus a workflow tool before evaluating solutions.
2. **They design for access and automation.** Leading firms are building processes that automatically file and route documents, reducing manual effort and improving consistency.
3. **They secure business sponsorship early.** The most successful initiatives pair IT leadership with a business sponsor responsible for driving adoption.
4. **They prioritize data quality.** Firms with smoother transitions plan for document cleanup, classification, and migration before implementation begins.

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