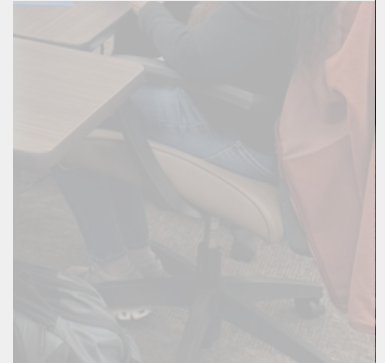
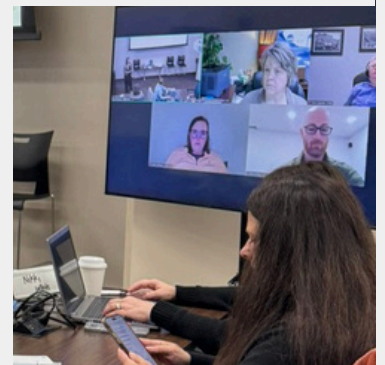


2026

Highlights from the

Boomer CAAS Circle

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



Highlights from the Boomer CAAS Circles™ - 2026 Fall Meeting

The Boomer CAAS Circles™ are communities 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 May 2026, Boomer CAAS Circles™ members gathered in Kansas City, Missouri, for two days of engaging conversation, collaborative problem-solving, and thought leadership. The discussions centered on the following topics.

- **Trends for 2026**
 - The accounting profession is moving through a set of forces that compress the window for reactive decision-making: AI-first culture, operating model redesign, profitability as a performance metric, a fundamentally different talent system, and strategic choice as an ongoing discipline rather than a periodic exercise.
 - In this joint session with both CAAS Circles, members learned about five macro trends shaping firms in 2026. Key themes included the shift from adding people to redesigning work, the rise of middle leadership as an orchestrator role, and how succession and PE pressure force urgent ownership conversations at firms of every size.
- **Sponsor Highlights**
 - Relationships with solution provider bring value through awareness of what's emerging and what other firms are already doing with the tools sitting inside their current tech stacks.
 - These sessions featured presentations from Wolters Kluwer, Basis, SysCloud, CPA.com and Intuit, covering automation across the engagement lifecycle, technology resources and updates on product direction for accounting firms. Q&A followed each presentation.
- **AI in CAAS Practices**
 - AI is a present capability for CAAS practices, and the gap between firms using it strategically and firms treating it as an occasional shortcut is widening fast.
 - In this session, we led members through the AI Opportunity Map, a three-part framework spanning Production, Communication, and Growth. The session included a deep dive on the Role, Action, Context, Expectation (RACE) prompting framework, with before-and-after examples that showed how structured prompts produce advisory-quality output versus generic responses.
- **Circle Exchange**
 - Peer-led case studies create a different kind of learning than any outside presenter can offer. Members see real implementation decisions, tradeoffs and outcomes from firms whose challenges mirror their own.

- This session included presentations from ATA, Porte Brown, Byrne Zizzi, Pinion, Adbo and CRS CPAs, with members walking through projects they implemented, the obstacles they encountered, and what they would do differently. Highlights included using dashboards to shift from backward-looking financials to future-focused advisory conversations and exploring new pricing models that reflect the value of insight.
- **CAAS Onboarding: Friction Points and Process Design**
 - Onboarding is where client relationships are won or lost before they even start, and CAAS practices consistently identify it as one of the highest-friction points in the engagement lifecycle.
 - During the Ask Your Peers session, members discussed several root causes driving onboarding breakdowns. One member pointed to bank account access as a persistent obstacle, as security protocols require personal credentials or real-time verification codes, creating bottlenecks teams can't easily work around. Another raised the question of whether a specialized onboarding team or the ongoing engagement team should lead the process, noting friction can run in both directions. Others highlighted the handoff problem: partners sell engagements, sign clients, and pass them to CAAS teams without communicating what was promised, leaving the delivery team to manage expectations they had no hand in setting.
- **Managing Scope Creep in Monthly Accounting and Advisory Engagements**
 - Scope creep is a common profitability killer in CAAS practices, and most firms acknowledge they're better at identifying it after the fact than preventing it.
 - Firms shared a range of approaches, including specific engagement letter language defining scope, client obligations, and deadlines. Other firms have flat-fee models that build in a re-evaluation window to preserve flexibility without reopening the hourly conversation. Facilitators challenged firms to examine scope change conversations differently. Rather than defaulting to billing out-of-scope time at hourly rates, use the moment as a signal that a larger advisory conversation may be overdue.
- **Modern Pricing and Client Alignment**
 - Pricing is an underdeveloped system in CAAS practices. Most firms quote engagements differently every time, with no standard packages, no defined sales process and no consistent mechanism for tracking whether the work was actually profitable.
 - This session led members through the six-step Smart Growth Framework, focusing heavily on packaging and scope management. Pre-meeting survey results showed 44% of firms have no standardized quoting process. The session covered how to structure three-tier service packages, how to move business development conversations from "what do you need?" to "what outcomes are

you trying to achieve?" and what firms can do before, during and after engagements to protect profitability.

- **Capacity Planning: Managing Fluctuations and Technology**
 - Capacity management is a persistent operational challenge in CAAS practices. While some firms have structured systems, others still run on spreadsheets or systems they regret buying.
 - Members shared a range of approaches, including technology they've implemented, using weekly manager meetings to unearth capacity and temporarily shift team members across pods or practice areas.

- **CAS Niches: Identifying, Growing and Building Team Expertise**
 - Niche focus is a clear lever for CAAS practices to drive profitability and differentiation, but most firms arrived at their niches by accident rather than design.
 - Members described widely varied paths, from building niche-specific ideal client profiles based on existing revenue and realization analysis to starting with geography and identifying which industries in those markets would benefit most from ongoing financial advisory. Several firms described inheriting niches from prior leadership or M&A, while others are still working toward definition.

An Invitation to Participate in the Boomer CAAS Circle™

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

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