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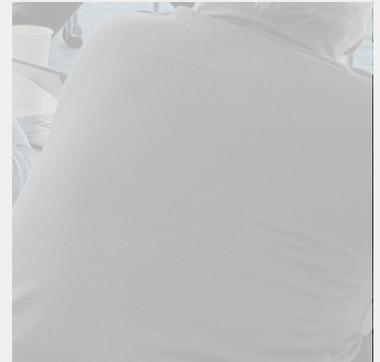## Highlights from the

Boomer CIO 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 CIO Circle™
2026 Spring Meeting

The Boomer CIO Circle™ is a community of IT leaders from forward-thinking firms who are committed to aligning technology and strategy at the highest levels. Members focus on developing the skills necessary to improve leadership beyond technology. Learn more at www.boomer.com.

This February, our members met in Puerto Vallarta, Mexico. The discussions were lively and insightful as each member shared perspectives on the challenges and opportunities facing their firm and the profession.

- **Innovation in Action**
  - Innovation is accelerating across the profession, and CIOs are uniquely positioned to identify which emerging technologies and ideas will create meaningful competitive advantage rather than distraction.
  - During this interactive session, members explored the innovations shaping firms today, including current AI adoption trends, productivity gains tied to expertise levels and the risks of "workslop."

- **Book Discussion**
  - Before the meeting, members were asked to read the book *Unreasonable Hospitality* by Will Guidara and come prepared to discuss.
  - During the meeting, members explored what "hospitality" means in a non-hospitality business, how AI and automation can enable more personal experiences, and how we can apply unreasonable hospitality in our firms and in real life.

- **Sponsor Highlights**
  - CIOs must continuously evaluate emerging solutions to enhance the client experience, strengthen service delivery and support scalable growth.
  - Representatives from Hubsync and Wolters Kluwer shared insights on workflow automation, secure client collaboration, regulatory alignment and technology strategies designed to help firms modernize while maintaining control and visibility.

- **Workday Implementation and Stabilization**
  - Large-scale platform implementations require strong governance, deep product knowledge and cross-functional alignment, especially when multiple lines of business and integrations are involved.
  - During the CIO exchange, members discussed a January 1 go-live of Workday across 14 business lines with 100 integrations, lessons learned around preparation and the realities of a post-implementation stabilization year.

- **Leading Adaptive Transformation in the Age of AI**
  - Transformation is continuous. CIOs must lead beyond technology decisions and balance innovation with risk while avoiding lock-ins across systems, vendors, processes, mindset and culture.

- o This workshop explored systems thinking, barriers to change, the Change Ladder and how flexibility and strong change initiators allow firms to innovate responsibly.

- **New IT Director's Strategic Transition**
  - o As firms elevate technology leadership, CIOs and IT Directors must shift from technical execution to strategic oversight, building trust while guiding infrastructure, data governance and AI decisions without getting lost in operational detail.
  - o During the CIO Exchange session, members discussed navigating this transition, strengthening relationships with IT teams, conducting effective one-on-ones and focusing on governance, risk and long-term direction rather than day-to-day troubleshooting.

- **Effective Staff Development Strategies**
  - o CIOs play a crucial role in building future-ready teams by developing talent pipelines, delegating strategically and creating clear career paths that support firm performance and individual growth.
  - o During the roundtable discussion, members discussed stretching high-potential team members before they feel fully ready, identifying meaningful responsibilities to delegate and focusing on long-term career growth rather than short-term retention.

- **Integrating Systems for Team Efficiency**
  - o As firms grow, disconnected systems and siloed knowledge slow execution and obscure capacity, making integrated platforms and reliable data essential for resource management and scalability.
  - o Members discussed centralizing scheduling, lessons learned from new scheduling rollouts, challenges within tax workflows and the leadership role required to align processes, data, data collection and cross-team coordination.

It's impossible to cover everything that we discussed at the last Boomer CIO Circle meeting in this short summary. However, the trends described in this report should give you great insight into the technology challenges and solutions that firms are considering today.

An Invitation to Participate in The Boomer CIO Circle™

To learn more about the Boomer CIO Circle community, please visit www.boomer.com/cio.

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