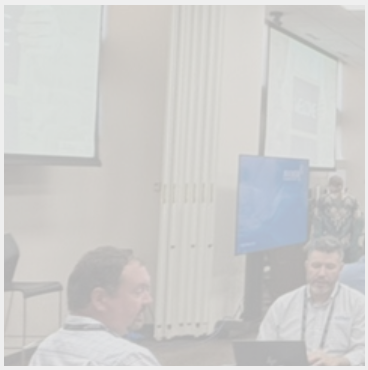
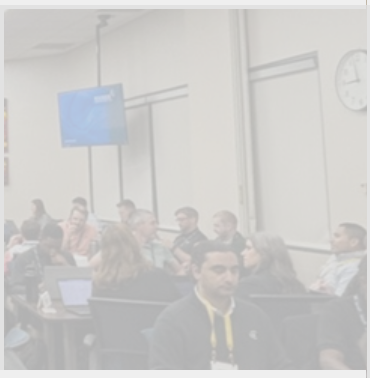
2026

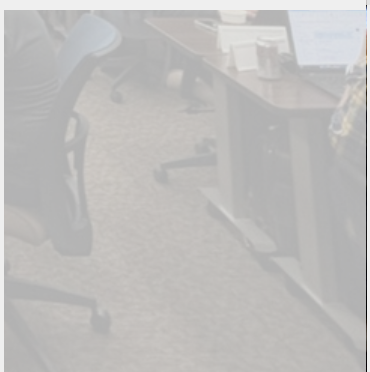
Highlights from the

Boomer Audit Leader 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 Audit Leader Circle™

2026 Fall Meeting

The Boomer Audit Leader Circle™ is a community of the accounting profession's top audit leaders within CPA firms. These leaders gather to collaborate and share leading-edge strategies in practice modernization and firm-wide alignment. Learn more at www.boomer.com/alc.

In October of 2026, Boomer Audit Leader Circle™ members met in Kansas City, Missouri, to share knowledge, discuss what the future holds for public accounting firms and build relationships with peers. The discussions centered around the following topics:

How to Measure Performance in a No Time Entry World

- AI reduces the hours a task takes, so firms using hours to bill and measure performance lower their revenue and reward effort over outcomes. Leaders need performance measures in place before they retire the timesheet.
- One member shared how her firm is preparing to eliminate time entry in audit and tax beginning January 2027. The audit team already uses fixed fees and weekly goals, with performance measures focused on completion timelines, review points and partner turnaround.

Boomer Insights

- Five macro trends are converging on the audit practice at once, and many leaders struggle to decide which one to act on first. Seeing how peers rank the trends helps leaders set priorities for their department.
- Members revisited five macro trends spanning AI, operating models, profitability, talent and strategic decision-making, then voted on the greatest impact on their firms. Small-group discussions explored changing staff skills, technology choices and the challenges of leading through rapid change.

Sponsor Highlights

- Audit technology changes fast, and hearing directly from vendors helps leaders judge which solutions fit their firm's clients, team members and risk.
- CaseWare and Wolters Kluwer presented. CaseWare covered AI-powered audit workflows and a 90-day pilot approach to avoid "pilot purgatory." Wolters Kluwer covered connected data across tax and assurance, the move from tasks to flow and carrying reviewer insights from one engagement to the next. Q&A followed.

Audit Leader Circle Exchange

- Audit leaders weigh AI, offshore teams and software changes without a playbook, so hearing about peer results and lessons learned saves months of trial and error.
- One member described Claude-based agents for audit planning, risk assessment and program design, aimed at bringing year-three efficiency to first-year engagements. He also shared a client rating tool that responds to billing activity. Another firm leader described moving benefit plan and not-for-profit work to offshore teams and shared lessons from a firm-wide OnPoint rollout, including tripling the vendor's time estimate for early engagements.

AI Tools in Audit Procedures, Workpapers, and Documentation

- Leaders feel pressure to show returns from AI, but they still lack clarity on which use cases pay off and how roles will change.
- Members shared uses for AI in financial statement checks, board-minute summaries and SOC report reviews. One firm described a demo that completed cash testing in 20 minutes and AP testing in under an hour. Members also discussed growing revenue without adding headcount and helping entry-level staff understand how AI will change their roles.

Managing Team Capacity and Deadlines

- During this Ask Your Peers session, a member discussed how late clients, illness, and turnover break busy season schedules when managers lack a firmwide view to rebalance work across engagements.
- Peers advised escalating staffing conflicts to partners who can set priorities across engagements. One firm schedules audit and accounting projects 12 months out in Dayshape while debriefing the current year. They also use "associate unassigned" placeholders for turnover and new hires and rely on two administrative team members to run the tool.

Expanding Advisory Opportunities from Audit Engagements

- Hours-based audit revenue is under pressure, but advisory growth threatens independence when no one considers the whole client.
- Members worked through how to find opportunities, protect independence and decide what serves the firm. One firm shared that it holds monthly client committee meetings with a tax gap checklist. Other firms generate engagement letters in Salesforce with attest-client flags, require CEO sign-off in a new client workbook and run quarterly independence checks. For the final decision, peers pointed to a one-firm mindset and helping the client find another auditor when advisory work wins.

This summary can't cover everything discussed at the Boomer Audit Leader Circle meeting, but these highlights offer insight into how firms are building more scalable, profitable audit practices.

An Invitation to Participate in the Boomer Audit Leader Circle™. To learn more about the Boomer Audit Leader Circle community, please visit www.boomer.com/alc.

About Boomer Consulting, Inc.

Boomer Consulting, Inc. provides consulting services to hundreds of the highest-performing CPA firms. Our unique and powerful solutions target five areas critical to a firm's success: Leadership, Talent, Growth, Technology and Process. For more information, visit www.boomer.com.