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Highlights from the

Boomer
CIO Circles

Winter 2023

Topic Highlights from The Boomer CIO Circle™ 2023 Winter 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. As always, 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**
  - Staying informed about the latest technology trends is key to continuing innovation and building your firm's future success.
  - Members and BCI consultants shared the most exciting innovations they've seen recently and presented them to their peers.

- **Book Discussion**
  - Before the meeting, members were asked to read the book Upstream by Dan Heath and come prepared to discuss.
  - During the meeting, members discussed their takeaways from the book, including the importance of getting the right people in the room for decisions, having a growth mindset, and getting more accurate data faster.

- **The Power of Process Workshop**
  - We tend to look at the technology tools we use every day through a narrow lens, looking at the features, functions and form but often neglecting to consider how the technology links to and creates a greater whole consisting of systems, feedback and behaviors.
  - In this interactive workshop, we examined the importance of designing systems intentionally, focusing on the cognitive, strategic and practical benefits of adopting a holistic approach. We also provided members with a tool to help quantitatively prioritize process improvements.

- **Sponsor Overview: Netgain**
  - Our sponsor, Netgain, provided an overview of who they are and how they help take firms to the cloud and provide IT as a service.
  - Members received the information they needed to ask informed questions and continue the discussion into the afternoon and evening.

- **CIO Exchange/Accountability Review**
  - Members shared their top three strategic projects and best practices from real-world experiences during an interactive roundtable discussion.
  - Some of the projects discussed include automating time entry using information from calendars and Zoom meetings, hiring a project management intern, and building out collaborative space in their real estate.

- **Mergers and Acquisitions**
  - Many of our member firms are engaging in merger and acquisition activity currently or in the near future.
  - Members discussed the lessons learned from this process, including the need to "mature" the technology team and operations and embed IT people in the new firm.

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 some great insight into the technology challenges and solutions that firms are thinking about 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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