

2026

Highlights from the

# Boomer Marketing & BD 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 Marketing & Business Development Circle™ – 2026 Spring Meeting

The Boomer Marketing & Business Development Circle™ is a community of marketing and business development professionals from forward-thinking firms who are committed to aligning marketing and business development initiatives with firm strategy. Learn more at [www.boomer.com/mbdc](http://www.boomer.com/mbdc).

This February, members met at the Accounting Innovation Center in Kansas City, Missouri, to share knowledge and build relationships with peers. The discussions centered around the following topics.

- **2026 Trends**

- Marketing and business development leaders need a clear view of emerging tech, talent and client trends to position their firms effectively and support strategic growth.
- During this session, we discussed macro trends expected to shape the accounting profession in the coming year, including the rise of AI-first cultures, the need to redesign operating models for scale and the growing importance of profitability, talent systems and continuous strategic decision-making.

- **Client Experience Strategy**

- Marketing and business development leaders play a critical role in helping firms focus their time, resources and relationship strategies on the clients that drive the most value, growth and long-term impact.
- During this session, members discussed how firms intentionally segment their client base and design elevated experiences for A-level clients. Participants explored frameworks for ranking clients and for delivering differentiated touchpoints, such as executive relationship meetings and proactive advisory conversations.

- **Operationalizing the A-Client Experience**

- Once firms define who their most valuable clients are, they must translate that strategy into consistent, repeatable actions that deepen relationships and drive growth.
- Two of our members shared how their firms operationalize A-client strategies through structured leadership engagement and data-driven insights. The discussion highlighted tools like client dashboards to track engagement, profitability and risk indicators and intentional touchpoints.

- **Evolving Roles in Marketing and Growth Teams**
  - Participants discussed how firms are restructuring marketing and growth teams, including the creation of industry marketing leads, marketing operations roles and hybrid positions that bridge marketing and business development.
  - The conversation also explored the skills that are hardest to hire for and how firms adjust team structures to support industry-focused growth strategies.
- **Aligning Marketing, Business Development and the Client Journey**
  - Members discussed the challenge of aligning content strategy, digital marketing and business development activities around a clear client journey.
  - Several participants shared that marketing initiatives often exist in silos and emphasized the need to unify messaging, strategy and internal communication so teams across the firm understand how marketing supports growth.
- **Measuring Marketing Impact and Communicating ROI**
  - Participants explored how firms track and communicate the value of marketing and growth initiatives.
  - Examples include measuring website-driven opportunities, analyzing closed-won and closed-lost leads and reporting results to leadership groups and boards to demonstrate the business impact of marketing activities.
- **Using Testimonials and Client Stories to Strengthen Marketing and Business Development**
  - Members discussed how client satisfaction calls and relationship meetings can generate testimonials and case studies that support marketing campaigns.
  - Firms shared how they turn client feedback into approved testimonials, maintain internal libraries of success stories and use them in outreach campaigns and social media to build credibility and attract new prospects.

It's impossible to cover everything we discussed at the Boomer Marketing and Business Development Circle in this short summary. However, the trends described in this report should give you insight into the marketing and business development challenges and solutions firms are considering today.

## **An Invitation to Participate in the Boomer Marketing & Business Development Circle™**

To learn more about the Boomer Marketing and Business Development Circle community, please visit [www.boomer.com/mbdc](http://www.boomer.com/mbdc).

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