

INSIDE THE MARKETING & BUSINESS DEVELOPMENT CIRCLE

FALL 2026



Marketing's Next Challenge: Turning Strategy into Measurable Growth

Marketing and business development leaders are being challenged to connect their work more directly to firm performance. As AI changes how buyers discover firms, leadership expectations around revenue grow, and client relationships become more strategic, the focus is shifting from marketing activity to measurable business impact.

SIGNALS FROM THE ROOM

SIGNAL 1 Marketing Accountability Moves Closer to Revenue

Firm leaders want greater visibility into how marketing and business development contribute to growth. Traditional activity metrics alone aren't enough. Marketing leaders are working to connect campaigns, pipeline activity and client opportunities to the financial outcomes that matter to firm leadership.

SIGNAL 2 AI Changes How Firms Get Discovered

As buyers increasingly use AI-powered search to research professional services, firms must rethink how their expertise is represented online. Marketing leaders are looking beyond traditional SEO to understand how AI platforms interpret their brands, identify content gaps and influence potential client discovery.

SIGNAL 3 Client Growth Requires Greater Firm-Wide Alignment

Growth strategies increasingly intersect with pricing, billing, client experience and internal operations. Marketing and BD leaders are examining how centralized approaches, stronger client intelligence and collaboration with firm leadership can support more consistent experiences and uncover opportunities to expand relationships.

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3 THINGS MARKETING & BD LEADERS ARE TESTING

✓ **AI Search Visibility Assessments**

Evaluating how AI platforms describe their firm's expertise, services and positioning, then identifying opportunities to improve visibility in AI-generated responses.

✓ **Centralized Billing and Pricing Models**

Exploring more consistent pricing, billing and bundled-service approaches while examining their impact on client satisfaction, retention and operational efficiency.

✓ **More Strategic Use of CRM Data**

Exploring how to turn existing client information into actionable intelligence, improve data quality and help professionals contribute context that supports relationship development and growth.

WHAT WE'RE HEARING

Revenue Impact Is Becoming the Common Language

The ability to connect marketing investment to meaningful business outcomes is increasingly important when communicating with firm leadership.

AI Visibility Requires a Different Approach

Being discoverable through traditional search doesn't necessarily mean a firm's expertise is clearly understood or represented by AI platforms.

Growth Depends on More Than Marketing

Pricing decisions, client experience and internal collaboration increasingly influence how effectively firms turn opportunities into lasting relationships.

TAKE IT BACK TO YOUR FIRM



Which marketing and business development metrics best demonstrate our contribution to revenue, and where are we missing visibility?



How accurately do AI platforms represent our firm's services, expertise and differentiators, and what information could strengthen that positioning?



Where could stronger collaboration between marketing, BD, finance and firm leadership improve client relationships or create new growth opportunities?

CONNECT THE DOTS

Marketing and business development leaders are taking on a more strategic role in how accounting firms grow. The opportunity is to connect better data, stronger client relationships and emerging technology to decisions that produce meaningful results.

Inside the Boomer Marketing & Business Development Circle, leaders compare approaches, challenge assumptions and learn from peers navigating these same priorities.

What could your firm accomplish with a network of growth-focused peers helping you think through what's next?

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