

Highlights from the

Boomer Marketing & BD Circle

Highlights from the Boomer Marketing & Business Development Circle™ – 2025 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.

This March, 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.

- **2025 Trends**
 - Our consultants tend to have their fingers on the pulse of the latest trends shaping the landscape for CPA firms.
 - During this session, attendees gained valuable perspectives on navigating trends like empowering team members with AI skills and scaling operations through digital infrastructure.
- **Increasing Online Leads**
 - Creating great content is just the start of effective lead generation. In this session, we explored tactics like using forms, gated vs. non-gated content, and digital ads to drive the quantity and quality of leads while tailoring approaches for different industries.
 - Through real-world case studies and actionable insights, members learned how to optimize strategies, analyze data and deliver measurable results.
- **Marketing & Business Development Exchange**
 - Before the meeting, we asked several firms to prepare to present a project they've implemented in their firms.
 - Some resources discussed include designpickle.com, creating an ideal client profile and a thought leadership program.
 - We also discussed creating themes for future exchanges and asking everyone to share something related to that topic.
- **Cross-Selling and Upselling Strategies**
 - Building trust and collaboration among partners is key to expanding your client base. This session explored ways to break down silos and foster cross-functional teamwork.
 - Our members left with practical tools to inspire cultural change and drive growth in their firms.

- **Sponsor Highlights**
 - Identifying new solutions and systems is a big part of the success of our firms.
 - During this session, we heard from our sponsor, Mole Street, about how their solution addresses changes facing the profession. Following a short presentation, we opened the floor for Q&A.
- **Boomer Updates**
 - During this session, we shared some updates around Boomer Consulting.
 - Some announcements shared include dates for the next Boomer Circle Summit, the CAAS course launched in the Boomer Knowledge Network, expanding Boomer Circle member metrics in 2025 and our Eagle U scholarship.
- **Future Planning**
 - We always want to ensure our Circle meetings address the topics our members want to hear about! To that end, we spend some time near the end of each meeting collecting ideas for future topics.
 - Some future topics discussed include effective lead generation and go-to-market strategies by industry and how to engage clients and prospects with interactive video.

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 some insight into the marketing and business development challenges and solutions that firms are thinking about today.

An Invitation to Participate in the Boomer Marketing and Business Development Circle™

To learn more about the Boomer Marketing and Business Development Circle community, please visit www.boomer.com/mbdc.

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 Processes. For more information, visit www.boomer.com