



Highlights from the

# Boomer Technology Circles

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## Topic Highlights from The Boomer Technology Circles 2022 Summit Meeting

The Boomer Technology Circles™ are technology-focused communities that bring together firm and IT leadership from peer accounting firms. Firms share knowledge, experiences and insights to help one another with management and technology decisions. Members meet three times a year and benefit from access to top solution providers and influencers within the profession. Learn more at [www.boomer.com/btc](http://www.boomer.com/btc).

In August of 2022, our Boomer Technology Circles met in Kansas City, Missouri, for our annual Summit. Below, we've summarized the top ten trends that emerged from the Summit 2022 Boomer Technology Circles meetings.

- **Beating Burnout**
  - It can be a cruel world with many causes for burnout in our teams and ourselves.
  - In this session, leaders learned how to identify burnout and create strategies to assist their teams in moving past burnout and into a creative and productive mindset.
- **Automation of Client & Employee Onboarding Processes**
  - Onboarding is essential to a strong business model. As we move to new creative ways of recruiting and finding team members and clients, we must evolve our methods for automating the onboarding process.
  - In this session, a panel of onboarding experts shared new systems and methods to use in the onboarding process.
- **The Boomer Briefing**
  - During an interactive panel discussion, our consultants answered questions from a pre-meeting survey of members about the latest trends, growth strategies and opportunities in the accounting profession.
- **A View from the Boardroom**
  - Customer engagement, economic uncertainty, the competitive landscape, transformation and diversity, equity, and inclusion dominate boardroom discussions today.
  - Keynote speaker Kimberly Ellison-Taylor discussed what looking around the corner on these issues really means and how inclusive leadership can improve engagement.
- **Imagineering the Workplace of 2030**
  - Imagineering the Workplace of 2030 can seem over-whelming.
  - In this session, we discussed specific actions you can take in talent, technology and innovation to ensure that your firm is protecting the current company while building a future company that will be amazing.

- **Building an IT Roadmap**
  - Today's technology professionals are expected to maintain current tech and develop the IT vision, strategy and roadmap for the future while ensuring alignment with the overall firm vision and strategy.
  - In this panel discussion session, members heard from IT leaders and consultants how they approach building an IT roadmap before engaging in discussion with the entire group.
  
- **The IT Team of the Future**
  - In late 2021, the Wall Street Journal published a controversial article titled, "It's Time to Get Rid of the IT Department." Right or wrong, it's a fact that the role of IT is changing rapidly.
  - In this facilitated group discussion, we explored what the IT team of tomorrow will need to look like to ensure success and future readiness.
  
- **Security Management**
  - Security continues to be one of the top issues for CPA firms worldwide. Keeping ahead of bad actors and adequate response planning are critical to your firm's success and sustainability.
  - In this session, we heard from a panel of peers how they manage security in their firms, including leveraging artificial intelligence, change and risk management, and response planning.
  
- **Change Leadership**
  - In our changing world, leadership requires that we push through the fear and uncertainty and look for opportunity.
  - In this session, we identified specific steps our members can take to capitalize on the changes they're leading through right now.
  
- **Sponsor Sessions**
  - Our sponsors hosted a variety of breakfast, lunch, special sessions and showcases our members could choose from, including:
    - **Intuit:** Create Your Path to Advisory Services Through Integration and Automation
    - **Sureprep:** Alleviating Staffing Concerns by Leveraging Automation with Outsourcing
    - **Diligence:** Power the Digital Firm with the Diligence Cloud
    - **Thomson Reuters:** Bring APIs to Life: Converting Theory Into Practical Use
    - **Wolters Kluwer:** Fostering a Culture of Innovation with Technology
  
- **Top 5 Software Programs an Accounting Firm Should Have or Consider Purchasing**
  - Complexity is a way of life for all firms, and finding ways to cut through that complexity is essential for leaders.
  - In this session, we cut through technological complexity by sharing the top five applications firms should consider today.

Thank you to our Platinum Sponsors: Netgain, Sage, Thomson Reuters and Wolters Kluwer and our Gold Sponsors: Aiwyn, Botkeeper, Cetrom, Intuit, Pax8 and Suralink. You can check out our other sponsors at <https://www.boomer.com/sponsors-btc>.

It's impossible to cover everything discussed at the Boomer Technology Circles Summit in this short summary. However, the trends described in this report should give you some great insight into what is happening in the profession.

### **An Invitation to Participate in The Boomer Technology Circles™**

Our next round of meetings will take place November 15-18, 2022. To learn more about the Boomer Technology Circles communities, please visit <http://www.boomer.com/btc>.

### **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](http://www.boomer.com).