

Highlights from the

Boomer Managing Partner Circle

Highlights from the Managing Partner Circle™ — 2025 Fall Meeting

The Boomer Managing Partner Circle is a community of Managing Partners from around the country who gather twice a year to share knowledge and best practices and propel each other to higher levels of success. Learn more at www.boomer.com/mpc.

In November of 2025, our members met in Kansas City, Missouri, for lively and insightful sharing of their perspectives on the challenges and opportunities facing their firm and the profession. The discussions centered on the following topics:

- **Evaluating New Tools and Applications in Practice**
 - Staying competitive requires continuously assessing which technologies will drive efficiency, reduce costs and strengthen the firm's long-term strategy.
 - This session explored emerging tools, AI research platforms and alternative tax solutions, putting them in the context of firm metrics and broader industry trends.
- **Innovative Paths for Firm Expansion and Scalability**
 - Managing partners must stay ahead of evolving growth models to ensure their firms can scale sustainably and compete in a shifting market.
 - This session examined organic and acquisition-based growth, outsourcing lessons, platform adoption and emerging practice management systems and metrics.
- **Sponsor Highlights**
 - Identifying new solutions and systems is a big part of the success of our firms.
 - We heard from our sponsors, alliantgroup and Firm360, about trends related to client experience, communication, accountability and other challenges facing the profession. A short Q&A followed.
- **Member Connection Program Coming in 2026**
 - Strengthening member-to-member collaboration is essential for managing partners who want deeper accountability, shared learning and more intentional relationship-building.
 - The upcoming program will create thoughtful annual pairings based on survey responses, aligning goals, focus areas and complementary strengths to turn networking into meaningful collaboration.
- **Smart Growth Framework for Modern Firms**
 - Firm leaders need a structured, repeatable approach to grow profitably without overextending teams or relying on constant hiring.
 - During this session, we walked through a growth framework, covering target client definition, lead-generation strategy and an intentional client intake process.

- **Managing Partner Circle Exchange**

- Before the meeting, we asked several members to bring an item, resource, project, technology, etc., that they developed or used internally to share with the group.
- Scott Anderson of Alliance Account, Paul Filippetti of Hoyt Filippetti, Jerry Grant of BBCM, Stewart Greene of TE Lott and Bryan Gruber of LSL shared project case studies, discussed challenges and solutions and explored how these resources strengthen upcoming initiatives.

- **Future Planning**

- This session allows us to discover what's on the minds of our members and identify future topics for Circle meetings and webinars.
- Participants identified priority topics for future sessions, such as partner performance, modern client experience, hospitality-inspired client care, metrics and business development capacity.

- **Take It Back Sharing**

- Managing Partners benefit from turning ideas into action, and the Take It Back process ensures that insights gathered during the meeting directly translate into firm-level improvements.
- Participants used the Take It Back tool to capture key learnings, outline next steps and share commitments with peers to build accountability and support implementation.

As always, it's impossible to cover everything discussed at the last Boomer Managing Partner Circle meeting in a short summary. However, the trends and issues described in this report should give you some great insight into the challenges and solutions that managing partners are thinking about today.

An Invitation to Participate in The Boomer Managing Partner Circle™

To learn more about The Boomer Managing Partner Circle™ community, please visit <http://www.boomer.com/mpc>.

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