

Highlights from the

Boomer Operations Circle

Topic Highlights from The Boomer Operations Circle™ 2025 Fall Meeting

The Boomer Operations Circle™ is a community of operational leaders from forward-thinking firms who are committed to designing and implementing better business strategies, plans and procedures in their firms. Learn more at www.boomer.com/oc.

This October, our members gathered in Kansas City, MO, for a lively and insightful exchange of perspectives on the challenges and opportunities facing their firm and the profession.

- **Defining and Developing the Role of Non-CPA Partners in the Firm**
 - Firms are increasingly elevating non-CPA and administrative leaders into partnership roles, but structures and expectations vary widely.
 - Attendees discussed opportunities and uncertainties around equity vs. income distinctions, regulatory implications, and pathways for advancement.
- **Reimagining Office Space for the Future**
 - As hybrid work becomes the norm, firms are rethinking how physical office space supports collaboration, culture, and connection.
 - Members shared lessons learned from recent lease negotiations and office redesigns, emphasizing flexible layouts, technology-enabled collaboration and a shift in mindset from viewing real estate as a mandate to a strategic asset that shapes firm culture.
- **Change Leadership in Our Rapidly Evolving Profession**
 - In this session, we explored the difference between managing change and leading it, emphasizing that lasting transformation happens when individuals, not just organizations, adapt.
 - Using a change leadership framework, participants discussed strategies for building change readiness, such as clarifying what's controllable, practicing disagreement without drama and defining success adaptability, to create firms that thrive amid constant evolution.
- **Sponsor Highlights**
 - Representatives from Intapp, Practice ERP and Wolters Kluwer shared insights on how firms are leveraging technology to strengthen client experience, streamline communication and improve accountability across teams.
 - Discussions focused on integration, automation and data-driven decision-making, reinforcing that the right systems increase efficiency and allow firms to deliver a more consistent and high-quality client experience.
- **Operations Exchange: AI Edition**
 - Prior to the meeting, we asked members to present a project they've implemented in their firms.

- Member firms shared AI-focused projects showcasing how automation, analytics and intelligent workflows are transforming operations, streamlining administrative tasks and improving decision-making and client service.
- **Enhancing Firm Processes for Scalability and Efficiency**
 - This session was a deep dive into how firms are streamlining operations through intentional process improvement. Attendees discussed using process mapping and "TOPS" teams to uncover inefficiencies and drive collaboration across departments.
 - The group explored the Transformation Triangle and the DOWNTIMR+A model for identifying waste, emphasizing that sustainable efficiency comes from aligning people, processes, and technology, supported by champions who model and reinforce change.
- **Employee Dashboards and KPIs that Drive Engagement and Performance**
 - This session guided participants through how firms use dashboards to connect individual performance with firm-wide strategy. Leaders shared how tools like Monday.com, Asana, and practice management systems help visualize accountability and progress in real time.
 - The discussion emphasized balancing quantitative KPIs with qualitative KBIs: measures of behavior, collaboration and impact. We also explored how gamification, transparency and consistent feedback turn data into motivation rather than micromanagement.
- **Take-It Back Sharing**
 - Personal planning time is a crucial component of our peer community meetings.
 - During this session, members had time to reflect on what they learned at the meeting and what actions they want to take over the next six months. Members met in small break-out groups to discuss their commitments.

It's impossible to cover everything discussed at the last Boomer Operations Circle meeting in this short summary. However, the trends described in this report should give you some great insight into the operational challenges and solutions that firms are thinking about today.

An Invitation to Participate in The Boomer Operations Circle™

To learn more about the Boomer Operations Circle community, please visit www.boomer.com/OC.

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