

2026

Highlights from the

Boomer Process Circle

Essential insights and takeaways from the latest Circle meeting that help your firm stay aligned, informed, and prepared for what comes next.



Highlights from the Boomer Process Circle™ 2026 Spring Meeting

The Boomer Process Circle™ is a community of the accounting profession's top lean and process leaders and champions within CPA firms. These leaders gather to collaborate and share leading-edge best practices in the areas of process improvement and innovation. Learn more at www.boomer.com/pc.

In April of 2026, Boomer Process Circle™ members met in Kansas City, Missouri, to share knowledge, discuss what the future holds for public accounting firms and build relationships with peers. The discussions centered around the following topics:

- **Trends for 2026**
 - Process leaders who stay ahead of shifts in the profession are better positioned to make proactive decisions rather than reacting to disruption after it arrives.
 - This session included a facilitated discussion on the emerging trends expected to define the profession in 2026, including the rise of AI-first culture and the shift in operating models from headcount-based growth to technology-enabled scale.
- **Turning an AR Policy Into a Collections Engine**
 - Aging accounts receivable creates cash flow challenges in accounting firms. Even when policies exist, they often go unenforced. One of our member firms found a way to automate protecting firm's revenue.
 - During our Circle Exchange session, a member firm shared how it built an automated stop work process inside its practice management system. When a client crosses a predefined AR threshold, the system flags the account overnight, suspends all associated jobs, and triggers a pre-populated partner email with client balance details and a hyperlinked template message to send the client. Since going live, the firm has collected over \$870K in slow-paying AR.
- **Managing Technology Decisions Without Burning Out Your Team**
 - Accounting firms face pressure to adopt new tools while keeping teams engaged and operations running. This creates real risk of change fatigue and wasted investment, so intentional decision-making is a critical leadership skill.
 - In this session, we walked through a framework of evaluating technology adoption decisions, weighing integration against best-in-class solutions and identifying when consolidation delivers more value than adding tools.
- **Turning Strategy into Action with the Five Pillars**
 - A strategic plan only creates value when it translates into the day-to-day processes that drive real outcomes. For process leaders, closing the gap

- between firm goals and operational execution is one of the most persistent challenges in practice management.
- During this facilitated session, we discussed the Five Pillars: Leadership, Talent, Technology, Growth, and Processes. These pillars serve as a foundation for examining how intentional process design supports strategic priorities. Members worked through examples from peer firms showing how targeted process improvements drive progress across each pillar.
 - **New Operational Roles to Drive Process and Technology**
 - During our “Ask Your Peers” session, members discussed the new roles they’re creating in their firms to build the operational backbone.
 - Members shared a range of new roles their firms have created in response to growing process and technology demands, including Director of Change Management, Director of AI, innovation leader and Process and Solutions leader.
 - **Sponsor Highlights**
 - Staying current on emerging solutions is essential for process leaders who want to make informed technology and service decisions and hearing directly from vendor thought leaders offers members a look at what’s available to address the profession’s current challenges.
 - Members heard from thought leaders at Practice ERP, Protection Plus and Remitian on trends related to client experience, communication and accountability. The session closed with open Q&A, allowing members to explore how these solutions might address challenges specific to their firms.
 - **Centralized vs. Assigned Administrative Staff**
 - During our Ask Your Peers session, member firms discussed perspectives on whether administrative staff should be centralized firm-wide, assigned by service line or department or dedicated to individual partners or groups.
 - One firm that made the shift away from individual assignment reported it would never go back, citing gaps in cross-training, lack of visibility into workload, and the accountability problems that arise when an admin can coast under a low-demand partner with no oversight.
 - **Building a Firm-Wide Process for Evaluating New Tools**
 - During our Ask Your Peers session, a member asked whether other firms have a formal process for evaluating technology options.
 - Several members described their firms’ structured intake methods, from online submission forms to designated service line liaisons. These firms route requests through a central team before any demo or purchase moves forward.

As always, it’s impossible to cover every detail of our great discussions and brainstorming sessions in this short, high-level summary. However, the topics in this report

should give you valuable insight into the challenges and solutions that the profession's Process leaders are considering today.

An Invitation to Participate in the Boomer Process Circle™

To learn more about the Boomer Process Circle community, please visit <https://www.boomer.com/pc>.

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