

Highlights from the

# Boomer Operations Circle

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Fall 2022

## Topic Highlights from The Boomer Operations Circle™ 2022 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](http://www.boomer.com/oc).

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

- **Cross-Selling and Data Tracking**
  - Accountability and communication are vital in leveraging cross-selling opportunities.
  - In this session, we explored aspects of business development and marketing concepts that can help grow cross-selling capabilities and techniques for tracking progress, tying results to compensation, value pricing and bundling services.
  
- **Change Management**
  - To effectively create change, firms must prepare and support individuals to adopt changes to reach the desired outcomes.
  - In this session, we created a framework for managing the people side of change and explored the “why” behind change management using the Prosci methodology.
  
- **Centralized Billing**
  - What software is the best for centralized billing? How do you keep centralized billing effective across multiple locations? How does this affect the client portal process?
  - During this session, we heard insights on the best ways to leverage centralized billing, including technologies and gaining partner buy-in.
  
- **Operations Circle Exchange**
  - Before the meeting, we asked members to bring a “show and tell” item—a resource, project or technology they’ve developed or use internally to share with the group.
  - Some of the resources shared include a Partner Metrics Dashboard, a template for communicating with clients about offshoring plans and 360 reviews.
  
- **Onboarding New Clients**
  - What is the best way to onboard a new client? Is there software that can automate the process?
  - In this session, we explored best practices for what happens after sending the engagement letter.
  
- **Engagement and Project Management**

- Once you onboard a new client, how do you manage and grow them?
- We'll build off the previous session by looking at the latest tools and processes for managing workload.
  
- **Leading and Managing a Remote Team**
  - As the number of companies offering workplace flexibility and remote work arrangements continues to grow, the likelihood that your firm will receive—or already has received—requests to work outside the office is quite high.
  - Remote work brings unique challenges, including keeping employees engaged, maintaining culture, technology and communication. Members prepared for these requests by discussing the appropriate technologies, expectations, criteria and policies.
  
- **Sponsor TED Talks**
  - Identifying new solutions and systems is a big part of an operations leader's responsibilities.
  - In this session, our sponsors, Aiwyn and Rippling, presented a brief overview of their products before opening the floor for questions.
  
- **Workload Compression**
  - Workload compression is a significant factor in the struggle to attract new talent to the profession.
  - Members discussed what they're doing about it, including reducing hours expectations, adjusting compensation and leveraging technology and processes.
  
- **Office Space vs. Remote Work**
  - Many firms now allow employees to work remotely at least part-time. So how are they handling providing employees with the ability to work in the office when needed or desired?
  - Members discussed the new protocols for office space, including hoteling, providing more collaboration space, and technologies they're leveraging for managing it.

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 great insight into the operational challenges and solutions that firms are considering 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](http://www.boomer.com/OC).

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Leadership, Talent, Growth, Technology and Processes. For more information, visit [www.boomer.com](http://www.boomer.com).