

Highlights from the

BOOMER MARKETING & BUSINESS DEVELOPMENT CIRCLE



2024



Highlights from the Boomer Marketing & Business Development Circle™ – 2024 Spring Meeting

The Boomer Marketing & Business Development Circle™ is a community of marketing and business development professionals from forward-thinking firms who are committed to aligning marketing and business development initiatives with firm strategy. Learn more at www.boomer.com/mbdc.

This March, members met at the Accounting Innovation Center in Kansas City to share knowledge and build relationships with peers. The discussions centered around the following topics.

- **Advisory Services**
 - The term “advisory services” encompasses a wide variety of services and business models.
 - In this session, we looked at the dynamic landscape of advisory services in the accounting profession. We discussed key strategies, tools, and best practices to enhance client value, foster growth, and stay ahead in today’s competitive market.

- **Marketing and Business Development Exchange**
 - Each member brought an item, resource, project or marketing technology that they developed or use internally to share with the group.
 - Some tools and resources shared include Sprout Social, employer branding updates, and building ideal customer profiles.

- **2024 Macro Trends**
 - Each year, the Boomer consultants gather to identify trends in the profession relating to five areas critical to a firm’s growth: Leadership, Talent, Process, Growth, and Technology.
 - This year, we identified five macro trends and five micro-trends within each. During this session, we discussed those macro trends and the micro trends impacting growth within each.

- **Prospect Journeys and Lead Generation**
 - During our Ask Your Peers session, a member asked what their peers are doing in the area of prospect journeys and lead generation on their websites.
 - Members discussed their process for creating and handling website leads, including booking calls with the business development team, producing content that solves problems, and integrating HubSpot with the website.

- **Cross-Selling Opportunities**
 - During our Ask Your Peers session, a member asked what other firms are doing for cross-selling or client opportunity planning initiatives.

- One member shared two questions they ask clients to uncover opportunities to offer additional services: What is the biggest challenge facing your organization? How do you plan to address these challenges? The answers help start conversations about other ways the firm can help.

It's impossible to cover everything we discussed at the Boomer Marketing and Business Development Circle in this short summary. However, the trends described in this report should give you some insight into the marketing and business development challenges and solutions that firms are thinking about today.

An Invitation to Participate in the Boomer Marketing and Business Development Circle™

To learn more about the Boomer Marketing and Business Development Circle community, please visit www.boomer.com/mbdc.

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