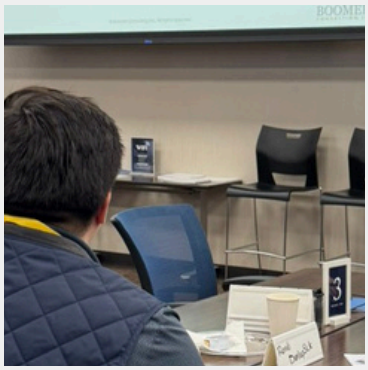
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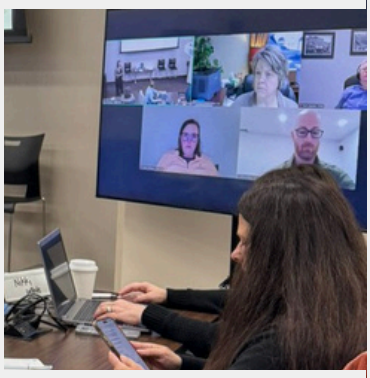
Highlights from the

Boomer CAAS Circle

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

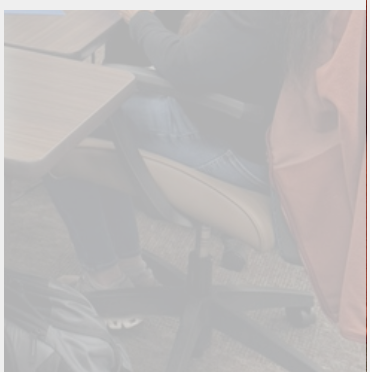












Highlights from the Boomer CAAS Circle™

Fall 2026

The Boomer CAAS Circles™ are communities of advisory services leaders helping one another develop the mindset, skillset and toolset for growing advisory services in their firms. Learn more at www.boomer.com/caasc.

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.

Optimizing CAAS Client Onboarding: Process, Automation & Technology

- A CAAS relationship sets its tone in the first few weeks. Ad hoc intake leaves firms with fuzzy scope, late partner handoffs and non-right-fit clients.
- In this panel discussion, we walked through a prospect journey built on tools like a web interest form, Power Automate creating a SharePoint prospect library and document requests with automated reminders. The biggest lesson is to define what an ideally onboarded client looks like before choosing automation. Attendees picked one onboarding improvement to finish before busy season.

How to Measure Performance in a No Time Entry World

- Realization and utilization reward the wrong behavior in a recurring, fixed-fee practice. But many firms keep entering client time because they fear losing control of scope, capacity and profit.
- This session walked through one member firm's no-client-time-entry model. The team defines the work, prices it upfront, creates a task in the workflow tool and bills when the task closes. The guardrail is "no task, no work." A five-factor difficulty rating sizes assignments and capacity, and department profit margin replaces WIP and realization. Table groups discussed how they would measure engagement profitability and capacity, and identified their biggest barrier to moving beyond the billable hour.

Boomer Insights

- Six months after our Spring meeting, the 2026 macro trends (AI-first culture, operating models redesigned by augmenting roles, profitability as the measure of execution quality, a new talent system and strategic choice as an ongoing discipline) affect CAAS leaders unevenly across AI adoption, pricing and talent.
- We recapped the five 2026 macro trends and members voted on the trend with the most impact since spring. Then they broke into groups to discuss how these trends affect their firms today and which one leaders need to act on first.

Sponsor Highlights

- Staying current on emerging solutions helps CAAS leaders confidently choose technology for client experience, communication and accountability.

- Sponsors CPA.com, Gr8Global, Madras, PABS and Rightworks shared their perspectives on trends in client experience, communication and accountability before opening the floor for Q&A.

CAAS Exchange

- Firms that implement alone repeat each other's mistakes. Hearing real projects and lessons shortens other members' rollouts.
- Some of the projects or tools discussed included moving QuickBooks Desktop clients online, launching a new advisory line, scheduling weekly focus time, team-led knowledge sharing, shifting data-entry-heavy clients from Accounting CS to QuickBooks Ledger, a 1099 offshore pilot, Double skills that turn point-of-sale reports into journal entries, a Claude skill that scopes QuickBooks cleanup fees for prospects, and a revenue-goal dashboard for a medical practice client.

Capacity Planning

- Burnout is pervasive, but many firms still assign work by guessing who looks free. Utilization and realization numbers can't show who has room.
- Two of our Circle members recently started adding budgeted hours to each project task in their workflow tools. This lets them run workload reports by team member. Members discussed how this supports capacity planning and the remaining timing problem, since a team member can sit at full capacity for the month while little work is ready in the first week.

Evaluating CAAS Engagement Profitability

- Most CAAS work now runs on fixed fees. Scope creep and rising transaction volume can erode margins before anyone notices.
- During this Ask Your Peers session discussion, one member firm discussed pricing from transaction volume in two niches, mortgage banking and real estate. Another member firm builds a 90-day pricing review into new proposals. One member shared they reviewed scope with each client team and noted that tripled transaction volume changes the price even when the scope stays the same. Another firm reviews every engagement in Q4 and holds scope conversations with clients in November and December.

Training for Team Members

- AI is absorbing data entry, so firms need to move accounting-level team members toward advisory work faster. Every client's tech stack differs, so little training content exists off the shelf.
- One firm surveyed team members and leads and learned about needs it had missed, such as intercompany ties and payroll entries that tie year-to-date. Another asked every team member for three training topics, including one advisory topic, and scheduled one-hour sessions every other week through November and December.

SSARS 27 Pitfalls

- Firms are rewriting engagement letters for SSARS 27 with little formal guidance, and a discrepancy in the letter or in the financial statement titles creates liability.
- During this Ask Your Peers discussion, one member asked what to watch for while drafting a new engagement letter. One member shared they asked their liability insurer what to include, then added language on third-party and offshore use and an appendix listing services and frequency.

Client Acceptance and Right-Fit Clients

- Taking every client who calls erodes margin, adds risk and wears down team members. A clear ideal client profile protects all three.
- During this Ask Your Peers discussion, one member shared how their firm built a Claude-powered survey around the firm's four CAAS tiers, and prospects complete it before anyone books a meeting. They revisit it periodically and check it against the firm's QMS, since wrong-fit clients often carry risk. The discussion pointed out that the profile should include how demanding a client is with the team, because the most profitable client can still drive turnover.

These highlights represent just a portion of the conversations from the CAAS Circle meetings. Through practical examples, peer collaboration and shared experiences, members explored ways to improve profitability, strengthen processes, develop talent and build more scalable advisory practices.

The discussions reflect the opportunities and challenges CAAS leaders are navigating as they prepare their firms for continued growth.

An Invitation to Participate in The Boomer CAAS Circle™

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

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