



INSIDE THE MANAGING PARTNER CIRCLE

TRENDS

Inside the Managing Partner Circle

This resource offers a behind-the-scenes look at how members of the Boomer Managing Partner Circle work through real challenges together. It's a snapshot of how they tackle a consequential decision: defining what belongs on the Managing Partner's desk and what doesn't.

The moment that triggers the conversation

"I'm still doing things I know I shouldn't be doing. I just don't have anyone else to hand them off to yet."

"We are growing, and I need someone focused on operations and execution while I focus on vision. I'm just not sure how to define where one role ends, and the other begins."

"Our COO is a CPA who doesn't practice anymore. I am not sure if that is the right fit, or what I actually need from that role."

These are the kinds of questions Managing Partners brought to the table at a recent Boomer Managing Partner Circle meeting. The firms in the room ranged from 17 to 200+ full-time equivalents (FTEs). Some had formal Chief Operating Officer (COO) roles. Some had firm administrators. Some had both. A few were still figuring out whether they needed either.

Nobody had a perfect answer. But the group used each other's experience to sharpen their understanding of the question. They left with clearer definitions and greater confidence in the decisions before them.

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What's changing: Trends Circle members are reacting to

Managing Partners in the Boomer Circles are leading a profession that is changing faster than their organizational structures were designed for. These are the signals they're seeing.

The Managing Partner role is evolving faster than the title

AI, advisory growth, succession pressure and technology transformation all land on the Managing Partner's desk at once. The tactical work, including operations, process, billing and staff management, crowds out the strategic work. Something has to give.

The gap between ops and admin is becoming distinct

Progressive firms are drawing a hard line. If a function doesn't eliminate decisions from the Managing Partner, stabilize capacity or improve delivery consistency at scale, it's administration, not operations. That framing changes what firms hire for and how they structure the role.

Succession increases the urgency of structural clarity

With partners retiring across the profession and next-generation leaders stepping up, firm leaders realize they cannot pass the baton without first documenting what the baton contains. You have to write down who owns what before handing it off.

The COO model isn't one-size-fits-all, and firm size matters

Firms with fewer than 30 FTEs often combine the COO and firm administrator functions in one person. Larger firms separate strategy execution from day-to-day operations. The right structure depends on the Managing Partner's time allocation, the firm's growth trajectory and the skills of the person in the role.

Shifts reshaping Managing Partner decision-making

Circle members don't jump to solutions. When this question came up in the room, they used questions like these to sharpen their thinking before making a decision.

- What decisions still depend on the Managing Partner that shouldn't?
- Are you hiring for a clearly defined role, or reacting to overwhelm?
- What's the distinction between operational management and strategy execution in your firm?
- Is your COO driving growth and reducing friction, or simply catching dropped tasks?
- How do you define and measure success for the role?

These are not questions with universal answers. They are lenses for examining where your firm actually is versus where you assume it is.





Why this works better in a peer community

Managing Partners can research leadership structures on their own. What they can't replicate is peer perspective.

Inside a Circle community, members hear how comparable firms are structuring these roles, what's working, and where challenges remain. They ask candid questions and learn from peers facing similar decisions.

That kind of clarity only comes from a trusted peer environment. Members leave with practical next steps and accountability that extends beyond the meeting.



What strong Managing Partners do differently

A few patterns consistently show up in firms making progress:

1. **They clearly separate operations from administration.** High-performing firms define the role around scaling the firm, improving delivery, and reducing leadership bottlenecks, not managing administrative tasks.
2. **They distinguish vision from execution.** The Managing Partner owns direction and culture; the COO owns execution, accountability, and operational follow-through.
3. **They define the role before hiring.** Firms seeing the most success document ownership, expectations, and outcomes upfront rather than shaping the role after the fact.
4. **They look for a change agent, not just a task coordinator.** The most valuable operations leaders identify friction, challenge outdated processes, and help move the firm forward.

See how the conversation unfolds

This is how the Boomer Managing Partner Circle works. Members don't just receive templates and frameworks. They take part in conversations with peers who run firms at a similar scale, face the same challenges and ask the same hard questions. These conversations help them make better decisions, faster.

[Join us in the Managing Partner Circle.](#)

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