



# INSIDE THE OPERATIONS CIRCLE TRENDS

## Inside the Operations Circle

This resource offers a behind-the-scenes look at how members of the Boomer Operations Circle stop losing institutional knowledge and start building scalable systems.

### The moment that triggers the conversation

Does any of this sound familiar?

“We have SOPs. They’re just scattered everywhere. Some are in Word docs, some in people’s heads.”

“Every time we update a process, the old version is still floating around somewhere.”

“When someone leaves, we realize they were the SOP. The documentation never actually caught up.”

“I know we need to fix this, but I don’t have time to rebuild the whole thing from scratch.”

At a recent Boomer Operations Circle meeting, one member opened the Ask Your Peers session with a deceptively simple question: “How do you keep track of your firm’s standard operating procedures?”

Through in-depth discussions they realized, none of them claimed to have it fully figured out. But each had moved the needle, and the group used that collective experience to help one another get further, faster.

TO JOIN & FURTHER INFORMATION:

[boomer.com/oc](https://boomer.com/oc)

### What's changing: Trends Circle members are reacting to

Operations leaders in the Boomer Circles respond to real shifts in how knowledge works inside firms. They work in forward-thinking firms across the country and see signals.

#### Institutional knowledge is walking out the door

As experienced staff retire or move on, firms discover that critical process knowledge was never documented. It existed only in someone's head. When that person leaves, so does the process. Firms that don't build structured knowledge repositories feel this acutely.

#### Technology evolves faster than documentation can keep up

Members of the Operations Circle actively manage systems like new practice management platforms, HR tools and workflow software. They're finding that old SOPs become outdated almost immediately. Static Word documents aren't built for this pace of change.

#### AI is only as useful as the content it can access

Firms using Microsoft Copilot and similar tools learn that AI retrieves and synthesizes what exists in a structured, accessible form. Scattered, inconsistent documentation produces scattered, inconsistent AI output. The race to AI readiness runs directly through SOP hygiene.

### Shifts redefining ops strategy in accounting firms

Circle members rarely jump straight to solutions. They work through the problem first. When the SOP conversation came up, the group used questions like these to get beneath the surface:

- Where does your institutional knowledge live right now?
- What happens when the person holding institutional knowledge leaves?
- When a process changes, how do you ensure everyone works from the same version?
- If someone new joined tomorrow, how long would it take them to find what they need, and how confident are you in what they'd find?
- Are you building documentation for humans, for AI tools or both? And does your current approach actually serve either?

These questions uncover gaps in thinking faster than any template or list of best practices ever could.





### Why this works better in a peer community

Operations leaders can research tools on their own—but they can't replicate real-world insight from peers.

Inside a Circle, members learn what firms are actually using, uncover risks before they surface, and pressure-test decisions with those who've already done it. They gain clarity on what works, what it costs, and what to do next.

The result isn't more ideas, it's clarity, shared language, and actionable next steps. That's peer accountability in action, grounded in real operational experience.



### What effective operations leaders do differently

A few patterns emerge across firms that have made real progress on SOP management.

1. **They treat documentation as ongoing.** Not a one-time project, but a habit—updated as systems, processes, and teams evolve.
2. **They consolidate before optimizing.** One clear source of truth comes first; perfection comes later.
3. **They match the tool to the task.** Not everything needs a formal SOP—sometimes a quick video does the job better.
4. **They think ahead to AI.** Organized, structured documentation makes future retrieval and automation possible.
5. **They don't wait until it's perfect to start.** As one Circle member put it, "We still have to update it, we have to get it right. But it's on its way." Starting creates momentum that waiting never does.

### See how the conversation unfolds

This is how the Boomer Operations Circle works. Members don't just receive templates and frameworks. They take part in conversations with peers who run firms at a similar scale, experience similar challenges and ask the same hard questions. These conversations help them make better decisions, faster. [Join us in the Operations Circle.](#)

TO JOIN & FURTHER INFORMATION:

[boomer.com/oc](https://boomer.com/oc)