

Highlights from the

# Boomer CAAS Circle

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## Highlights from the Boomer CAAS Circles™ - 2025 Fall Meeting

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 <https://www.boomer.com/caasc>.

In October 2025, Boomer CAAS Circles™ members gathered in Kansas City, Missouri, for two days of engaging conversation, collaborative problem-solving, and thought leadership. The discussions centered on the following topics.

- **Pricing Strategies**
  - Jim Boomer shared how aligning pricing strategy with the 6-Step Smart Growth Framework elevates profitability, attracts ideal clients and strengthens firmwide confidence in value-based pricing.
  - Members discussed practical ways to improve pricing consistency and empower teams to confidently deliver higher-value advisory work that supports sustainable growth.
- **Trends in Recruitment, Retention and Leadership Development**
  - We discussed how hybrid work, technology roles and fractional talent are reshaping traditional career ladders and expanding leadership opportunities beyond the CPA track.
  - Members explored strategies for developing and retaining emerging leaders through intentional learning and development programs that support both technical and non-technical professionals.
- **Shifting from Transactional Work to Strategic Advisory**
  - In this session, our consultants guided members through strategies for transitioning teams from compliance-driven work to high-impact advisory services using KPIs and value-added reporting to drive forward-looking client decisions.
  - The decision centered on coaching techniques and cultural shifts that build confidence, foster a growth mindset and empower professionals to lead strategic conversations with clients.
- **Member Connection Program Coming in 2026**
  - Boomer Consulting introduced the upcoming Member Connection Program, designed to transform networking from passive connections to active, intentional collaborations across the CAAS community.
  - Beginning in 2026, members will be paired based on shared goals, focus areas and complementary strengths, creating accountability and deeper peer partnerships that drive growth and innovation between meetings.

- **CAAS Circle Exchange**
  - Members showcased firm projects and shared practical tools like GoProposal, Ignition, Basis and AI-driven onboarding systems that improve pricing, client engagement and operational efficiency.
  - The collaborative discussion focused on lessons learned, implementation challenges and best practices members can adapt to strengthen their own firm initiatives and advisory service delivery.
  
- **Future Planning**
  - Members reflected on major takeaways from the meeting and collaborated using onsite technology to identify high-impact topics for future webinars and Circle sessions.
  - The discussion focused on prioritizing strategic initiatives that will drive continued firm growth, innovation and learning in the year ahead.
  
- **Ask Your Peers**
  - In this collaborative session, members crowdsourced solutions to real-time firm challenges, exchanging ideas on management, operations and service delivery innovations.
  - Discussions emphasized peer learning and practical takeaways, helping participants identify actionable steps to implement immediately within their own firms.
  
- **Take It Back Sharing**
  - Members used the Take It Back tool to capture insights, commitments and strategies to apply within their firms after the meeting.
  - By sharing action plans and accountability goals with peers, participants reinforced collaboration and ensured ongoing momentum for implementing new ideas.
  
- **Sponsor Highlights**
  - Members heard from thought leaders at CPA.com, Digits, Rightworks and Zoho about emerging technologies that improve client experience, streamline communication and improve accountability across firms.
  - The session concluded with an open Q&A, allowing members to explore how these solutions can address current challenges and support their firms' evolving advisory strategies.

## **An Invitation to Participate in the Boomer CAAS Circle™**

To learn more about the CAAS Circle community, please visit <https://www.boomer.com/caasc>.

### **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](http://www.boomer.com)