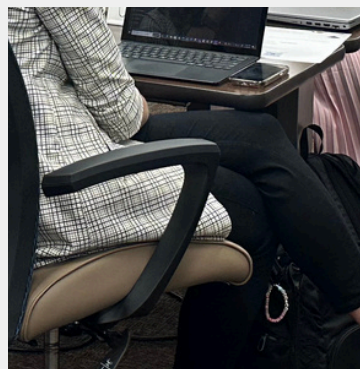


2026

Highlights from the

Boomer Marketing & BD 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 Marketing & Business Development Circle™ 2026 Fall 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 October, members met at the Accounting Innovation Center in Kansas City, Missouri, to share knowledge and build relationships with peers. Discussions centered on the following topics.

Centralized Billing and Pricing Insights

- Billing and pricing are becoming important opportunities for firms to improve consistency, protect profitability and strengthen the client experience. One member firm shared how it is moving toward centralized billing to reduce administrative demands on professionals and create a more consistent process for clients.
- Two member of that firm shared their experience transitioning to centralized billing, including hiring three billing coordinators and developing standardized billing options. While the initiative is creating a more structured approach, the firm is still working through challenges related to adoption and work in process (WIP). They also discussed plans to strengthen accountability and explore a pricing committee in 2027. A key takeaway was the importance of clear communication, defined processes and internal buy-in when implementing significant operational changes.

Marketing Metrics and Revenue Growth

- Leadership teams increasingly ask marketing to prove revenue impact. One firm said this is the first time in 25 years they've faced the question, and another said it can offer only qualitative metrics today.
- Peers split on where marketing's accountability ends. One firm measures qualified leads and leaves pipeline movement to BD. Another uses a HubSpot "deal source" field, and conference attribution showed two deals from one event and three from another, which covered the sponsorship costs. Kevin McGuire of Mole Street urged firms to track conversion by source, salesperson and industry. A firm without HubSpot said it is working with its data team to separate marketing-influenced from marketing-sourced revenue

Circle Exchange

- Firms learn faster from peer projects with real results than from theory, especially as AI and rebrands compete for marketing's attention.
- One of our members showed an intranet built on data warehouse integration. It reached 93.5% engagement against an 80% goal, and 23% of users publish their own content. Another showed a Claude-built proposal web app, hosted on Azure, that works as a decision tree. She also described tiered reviews: engagements under \$50,000 stay with the practitioner, and those at \$100,000 and above get full custom design.

Making CRM Client Data Useful

- Firms are looking for better ways to turn CRM data into useful insights that support client relationships and business development. A recurring challenge is encouraging professionals to consistently capture, maintain and use that information.
- One of our member firms uses D365 for CRM and Domo dashboards by industry, service line and individual goals, then reviews them in pipeline meetings. The discussion turned to contact quality. One member described reviewing 900-line Excel lists by hand because HubSpot doesn't integrate with its practice management system. Another member built a "data cleanliness" workflow with bounce thresholds and red, yellow and green flags.

Sponsor Highlights

- Sponsor presentations introduced members to technology and services designed to improve financial operations, CRM integration and data-driven growth strategies.
- Sponsors BILL, Mole Street and 4impactdata shared solutions supporting firm operations and growth. BILL highlighted accounts payable, accounts receivable and expense management capabilities. Mole Street discussed connecting HubSpot with other firm systems to improve data accessibility and marketing effectiveness. 4impactdata introduced its approach to identifying growth opportunities within existing client relationships through data-driven insights. Members had opportunities to ask questions and explore how these solutions might support their firms.

Boomer Insights

- Five macro trends are changing what firm leaders expect from marketing and business development roles. Growth is now at the center of firm strategy, so these roles are more meaningful than they were 12 to 24 months ago.
- In this session, we walked through the trends. Members voted on the one with the biggest impact currently, then debated it in small groups. One group described loving and hating AI at the same time, because practice teams now hand market 100% AI-generated content and 85-page documents to "make pretty."

What SEOs Gets Wrong About AI Search

- As buyers increasingly use AI-powered search to research professional services, firms need to understand how these platforms interpret and recommend their expertise. Traditional SEO remains important, but improving visibility in AI-generated responses requires a closer look at how a firm's content answers buyer questions and communicates its differentiators.
- Andy Crestodina challenged conventional SEO recommendations and shared practical ways to improve visibility in AI-generated search results. He highlighted the value of using actual sales conversations to identify the questions prospective clients ask, rather than relying solely on keyword research tools. Members also explored how AI platforms access and interpret website content, including the importance of clear service descriptions, relevant expertise and strong homepage content. The session included practical exercises to help members assess how AI represents their firms and identify opportunities for improvement.

These highlights offer a glimpse into the conversations happening inside the Boomer Marketing & Business Development Circle. From measuring marketing's contribution to revenue to exploring AI-powered search and improving client data, members are sharing practical approaches to common challenges and learning from one another's experiences.

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.

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