

Highlights from the

# BOOMER MARKETING & BUSINESS DEVELOPMENT CIRCLE

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# 2024



## Highlights from the Boomer Marketing & Business Development Circle™ – 2024 Spring 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](http://www.boomer.com/mbdc).

This October, members met at the Accounting Innovation Center in Kansas City to share knowledge and build relationships with peers. The discussions centered around the following topics.

- **Boomer Briefing**
  - Our consultants tend to have their fingers on the pulse of the latest trends shaping the landscape for CPA firms.
  - During this session, attendees gained valuable perspectives on how to navigate trends like artificial intelligence and the evolution of the business model and position their firms for success.
- **Client Experience**
  - In this session, Kristen Lollar, CMO at Witley Penn, and Wesley Burt, CMO at Hogan Taylor, shared how they've improved client experience at their firms.
  - They talked about the steps they've taken, the challenges they've faced, and how they continue to adapt to meet client needs.
- **Marketing & Business Development Exchange**
  - Prior to the meeting, we asked several firms to prepare to present a project they've implemented in their firms.
  - Some of the projects shared include an Olympics-themed cross-selling initiative, creating firm and culture handbook, CRM implementation, and one firm's process for marketing and growing a service line.
- **Digital Marketing Trends**
  - In this session, Kendall Jones of Whitley Penn and Heather Robinson with Boomer Consulting shared some of the latest digital marketing trends and tools and how you can leverage them.
  - Some trends discussed include a new approach to content generation, artificial intelligence, website trends and performance metrics.
- **Client Appreciation Events**
  - During our Ask Your Peers session, a member asked what other firms are doing for client appreciation events.
  - Some ideas include a small wine-tasting event for a handful of clients and using these events to roll out new services.

- **Roles and Responsibilities of the M&BD Team**

- One of our members has been tasked with envisioning their “dream team” if the firm's revenue was double the size and asked their peers what roles M&BD professionals currently hold in their firms.
- Several members shared their firms' revenue, how many people are currently in their marketing and business development department, and the different positions their team members fill.

It's impossible to cover everything we discussed at the Boomer Marketing and Business Development Circle in this short summary. However, the trends described in this report should give you some insight into the marketing and business development challenges and solutions that firms are thinking about today.

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

### **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)