

Highlights from the

# Boomer Process Circle

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## Highlights from the Boomer Process Circle™ 2025 Spring Meeting

The Boomer Process Circle™ is a community of the accounting profession's top lean and process leaders and champions within CPA firms. These leaders gather to collaborate and share leading-edge best practices in the areas of process improvement and innovation. Learn more at [www.boomer.com/pc](http://www.boomer.com/pc).

In April of 2025, Boomer Process Circle™ members met in Kansas City, Missouri, to share knowledge, discuss what the future holds for public accounting firms and build relationships with peers. The discussions centered around the following topics:

- **Trends for 2025**
  - During this session, we looked at the trends shaping the accounting profession so firm leaders can plan for the year ahead.
  - Some of the trends discussed include leading with a future focus and agility, capitalizing on the opportunity to evolve and building an AI-ready infrastructure.
- **Process Circle Exchange**
  - Prior to the meeting, we asked several firms to present a project or tool they've implemented in their firms.
  - Mercadien, Anders, Blue & Co., and Pinion presented tools they use and lessons learned from the experience.
- **Gaining Adoption and Evaluating Use Cases for Generative AI**
  - This session explored how firms are leveraging generative AI to enhance workflows, collaboration and efficiency.
  - Attendees gained insights into practical applications and learned strategies to drive engagement and adoption across the firm.
- **Transformation Triangle Fundamentals**
  - In this session, we explored three essential frameworks: Process Improvement, Project Management and Change Management. We discussed how they work together to drive organizational success.
  - Members learned how to optimize processes, manage projects effectively and navigate change to achieve business goals.
- **How Firms Standardize Processes Across Multiple Offices**
  - During our "Ask Your Peers" session, a member asked how other firms with multiple offices standardize processes across locations while maintaining team engagement and visibility into local needs.
  - Members discussed how they tackle the problem by appointing a managing partner for virtual offices and events specially designed for distributed teams.

- **Sponsor Highlights**
  - Identifying new solutions and systems is a big part of the success of our firms.
  - During this session, members heard about trends in the profession from our sponsors, Circit and Firm 360, before opening the floor to Q&A.
- **Open Q&A**
  - During this part of our meeting, members can lay it all out on the table and ask their peers anything on their minds.
  - Members posed questions on Conferences IO and voted on the ones they wanted to discuss further.
- **Take it Back Sharing**
  - We never want our members to leave without allowing them to reflect on what they've learned and document their action plans.
  - Members broke out into small groups to share their plans with peers and discuss significant projects for the coming quarter.

As always, it's impossible to cover every detail of our great discussions and brainstorming sessions in this short, high-level summary. However, the topics mentioned in this report should give you some great insight into the challenges and solutions that the profession's Process leaders are thinking about today.

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

To learn more about the Boomer Process Circle community, please visit <https://www.boomer.com/pc>.

### **About Boomer Consulting, Inc.**

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