

Highlights from the
**BOOMER
PROCESS
CIRCLE**



2024



Highlights from the Boomer Process Circle™ 2024 Fall 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.

In October of 2024, 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:

- **The Boomer Briefing**
 - During this session, we looked at the trends firms should consider and plan for in the year ahead.
 - Some of the trends discussed include artificial intelligence (AI), the Transformation Triangle, the Evolution of the Business Model, Navigating the Capacity Puzzle, and Ideation and Experimentation.
- **Process Circle Exchange**
 - Prior to the meeting, we asked several firms to present a project or tool they've implemented in their firms.
 - Two tools discussed in the exchange are Amplos, a performance psychology service, and CaveDay, a platform for hosting virtual coworking sessions.
- **Enhancing Tax Admin Support and Building Value-Driven Roles**
 - This facilitated discussion explored how firms structure their tax administration support teams, focusing on the roles and responsibilities.
 - We discussed innovative versus practical approaches, the importance of defining admin roles versus client service tasks and leveraging technology to enhance administrative functions.
- **Process as a Service Offering**
 - In this session, Stephen Jarrell of Polk & Associates provided a framework and shared lessons learned from firms offering process as a service to clients.
 - Stephen discussed how to upskill practitioners in this emerging area and explored successful strategies for expanding service capabilities beyond traditional roles.
- **Positive mindset**
 - Mindset is a huge component of the Boomer Process Circle.
 - During our Positive Mindset, our members look at their accomplishments and share progress toward their goals since the last meeting.
- **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, Amelio, IRIS, and K1x, 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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