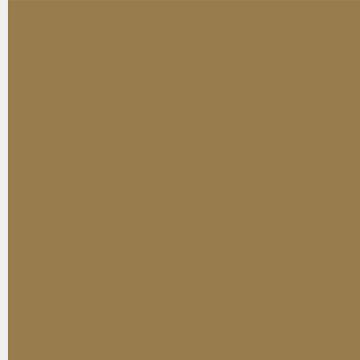


2026

Highlights from the

Boomer Operations Circle

Essential insights and takeaways from the latest Circle meeting that help your firm stay aligned, informed, and prepared for what comes next.



Topic Highlights from The Boomer Operations Circles™ 2026 Spring Meetings

The Boomer Operations Circles™ are communities of operational leaders from forward-thinking firms who are committed to designing and implementing better business strategies, plans and procedures in their firms. Learn more at www.boomer.com/oc.

This February, our members gathered in Kansas City, MO, for a lively and insightful exchange of perspectives on the challenges and opportunities facing their firm and the profession.

- **AI Use Cases and Examples**
 - AI is reshaping professional services, and firm leaders need practical guidance on where AI can create value today while managing risk and setting realistic expectations for adoption.
 - This session explored real-world AI use cases in accounting firms. Participants discussed examples across learning and development, performance management, marketing and operations
- **2026 Trends**
 - Firm leaders must anticipate shifts in technology, talent expectations and client demands to position their firms for sustainable growth and operational resilience.
 - This session covered the trends expected to shape the profession in 2026, including AI-first cultures and profitability as the primary metric.
- **Data-Driven Resource Planning**
 - Firm leaders need better data and visibility into performance, capacity and skills to make informed staffing and operational decisions.
 - This facilitated discussion revolved around how firms use data to guide resource management and workforce planning. Participants explored the key performance and behavioral indicators leaders monitor and the reporting tools they use to communicate insights and align staffing decisions with financial and strategic goals.
- **Solutions for Growth**
 - Many firms experience a growing gap in mid-level leadership, and it puts pressure on partners and senior leaders while leaving up-and-coming professionals without a clear pathway to take on greater responsibility.
 - This session included a discussion on strategies to develop and support mid-level professionals. Members shared how they cultivate emerging leaders, encourage greater ownership of client relationships and work outcomes and implement project and capacity management approaches that help mid-level team members navigate heavy workloads during peak periods.

- **Accountability Framework**
 - Clear accountability frameworks help firms align expectations across partners, managers and staff while reinforcing behaviors and outcomes that drive performance, collaboration and client service.
 - This facilitated discussion covered how firms define and measure accountability when they don't have traditional tools like a balanced scorecard in place.
- **Sponsor Highlights**
 - Staying informed about emerging tools and systems helps operations leaders identify and evaluate solutions that can improve client experience, strengthen communication and support operational accountability.
 - Representatives from Firm 360, Wolters Kluwer and Caseware shared their perspectives on trends shaping firm operations and technology adoption, followed by an open Q&A.
- **Using Microlearning Videos to Improve New Hire Onboarding**
 - One member firm shared how they use short two- or three-minute training videos to reinforce onboarding after orientation.
 - The series of weekly videos covers practical processes like requesting PTO, submitting expense reimbursements and handling common IT issues. These short refresher videos help new hires absorb information that may have been overwhelming during their first week.
- **Building Internal Knowledge Bases for Policy and Process Questions**
 - Participants discussed creating centralized knowledge resources where team members can find answers to common internal questions.
 - Some firms pair these knowledge bases with AI-powered search tools so employees can ask questions and locate policies or procedures without relying on HR or Operations staff.
- **Improving Time-Entry Compliance with Operational Dashboards**
 - One firm shared how they built a time-adherence dashboard to monitor whether employees submit time entries on schedule. The dashboard highlights missed deadlines and allows leaders to view compliance by department and individual.
 - The discussion focused on using operational data to reinforce expectations and drive better time reporting habits across the firm.

It's impossible to cover everything discussed at the last Boomer Operations Circle meeting in this short summary. However, the trends described in this report should give you some great insight into the operational challenges and solutions that firms are thinking about today.

An Invitation to Participate in The Boomer Operations Circle™

To learn more about the Boomer Operations Circle community, please visit www.boomer.com/OC.

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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.