

Highlights from the

Boomer Process Circle

Spring 2022

Highlights from the Boomer Process Circle™ 2022 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.

In May of 2022, Boomer Process Circle™ members met virtually 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 Update**
 - Amanda Wilkie and Arianna Campbell shared updates and insights on what's happening in our profession and how these trends directly relate to process.
- **Lean Six Sigma Refresher**
 - If a firm hasn't refreshed its processes since 2020, they're out of date.
 - In this session, we reviewed the Lean Six Sigma fundamentals and shared tools and best practices for following the proven framework for process improvement.
- **Client Accountability**
 - There are two sides to any healthy relationship. In the relationship between a firm and its clients, the firm is responsible for leading clients are responsible for participating—following the processes you set for them, providing the information you ask for, and doing it within a timeframe that you stipulate.
 - In this session, we offered attendees the opportunity to collaborate on strategies to hold clients accountable and make it easier for clients to do business with the firm.
- **Project Management**
 - Effective project management can help your team manage the flow of projects and do their best work.
 - In this session, we reviewed the foundations of project management and discussed what differentiates project management from process improvement.
- **Change Management Workshop**
 - The best application or new process will struggle to meet its ROI without the key element: People.
 - This presentation from Christine Flott of LBMC explained why using a change management framework is important and taught attendees to apply this framework to their next change initiative.
- **Accountability Review**
 - Accountability is a huge component of the Boomer Process Circle.

- During our Accountability Review, we look back at our members' progress since the last meeting and have an opportunity to share and build our peer networks.
- **Sponsor Innovation Sessions**
 - Members had a chance to attend a session hosted by a sponsor to learn how savvy solution providers focus on innovation and continuous improvement.
- **Open Q&A**
 - During this part of our meeting, members have a chance to 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.
- **Action Plans**
 - We never want our members to leave without providing an opportunity 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 major 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>.

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