

Highlights from the

# Boomer Technology Circles

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## Topic Highlights from The Boomer Technology Circles 2025 Spring Meeting

The Boomer Technology Circles™ are technology-focused communities that bring together firm and IT leadership from peer accounting firms. Firms share knowledge, experiences, and insights to help one another make management and technology decisions. Members meet three times a year and benefit from access to top solution providers and influencers within the profession. Learn more at [www.boomer.com/btc](http://www.boomer.com/btc).

In May 2025, our Boomer Technology Circles met in Kansas City, Missouri. Below, we've summarized the top ten trends from the Fall 2024 Boomer Technology Circles meetings.

- **The 2025 Trends**

- Enhancing your expertise and focusing on future developments are essential for leading your firm.
- In this session, we dug into the macro trends for the coming year and discussed specific strategies your firm needs to consider now.

- **Process Evaluation & Improvement: Lean Six Sigma and Beyond**

- How can firms effectively evaluate and improve processes?
- This session covered best practices, common pitfalls and the fundamentals of Lean Six Sigma, including tools like the nine categories of waste and process mapping. We also explored automation frameworks, process mining and AI's role in identifying inefficiencies.

- **Moving On-Prem File Shares to Azure: Best Practices and Lessons Learned**

- As firms look to migrate on-premises file shares to Azure while maintaining on-prem infrastructure for servers and Active Directory, they're looking for strategies for a smooth transition.
- This session focused on methodologies, setup considerations, and configuration best practices to optimize for tools like CoPilot. Members learned from firms at different stages of this process, heard real-world experiences and discussed key takeaways for a successful migration.

- **Vendor Management: Best Practices and Risk Assessment**

- How are firms managing vendor onboarding, risk assessments, and ongoing monitoring?
- This panel discussion explored best practices, ownership and processes for maintaining vendor relationships.

- **Project Management Strategies for Firms**

- More firms are hiring project managers. This session explored project management best practices, including Agile methodologies for non-development teams.
- Ashton Barrell of Pinion led the discussion and provided insights on structuring PM roles for success.

- **Hiring an FTE for Integrations vs. Engaging an IT Consultant**
  - As firms expand their tech stacks, many wonder whether they should hire a full-time employee for integrations or work with an external consultant.
  - This session explored current IT roles, team structures and future needs. A pre-session survey and shared org charts provided insights to guide the conversation.
- **AI Preparation and Readiness**
  - As AI continues to shape the industry, firms must assess their readiness and establish clear policies, procedures and governance.
  - This session explored best practices for AI adoption, guided by insights from a pre-session readiness assessment survey of Circle members.
- **Busy Season Debrief: Lessons Learned & Key Trends**
  - What went right this busy season? What needs to change?
  - In a peer-driven discussion, we covered key takeaways, including expectations, offshoring, resource allocation, revenue shifts and staff hours. We also explored trends in profitability, burnout and process improvement to help member firms plan for a smarter next year.
- **AI in Busy Season: New Uses and Lessons Learned**
  - How did AI support our member firms this busy season in ways it hadn't before?
  - In this interactive session, we explored tools firms have tested, how they're using AI within software suites and strategies for training employees on AI adoption. Some use cases discussed include taking notes at meetings and drafting email responses.
- **Client Relationship Changes**
  - During our "Ask Your Peers" session, a member asked what client relationship changes other firms are making in 2025.
  - Several members weighed in on transitioning client relationships sooner and making a "fresh start" with clients, leading to a 4- 10X fee increase by identifying additional services for existing clients.

It's impossible to cover everything discussed at the last Boomer Technology Circles meetings in this summary. However, the trends described in this report offer insight into what is happening in the profession.

### **An Invitation to Participate in The Boomer Technology Circles™**

The Boomer Circle Summit will take place August 17 – 20, 2025. To learn more about the Boomer Technology Circles communities, please visit <http://www.boomer.com/btc>.

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

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