

Highlights from the

# BOOMER MANAGING PARTNER CIRCLE

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# 2024



## Highlights from the Managing Partner Circle™ — 2024 Fall Meeting

The Boomer Managing Partner Circle is a community of Managing Partners from around the country that get together twice a year to share knowledge and best practices and propel each other to higher levels of success. Learn more at [www.boomer.com/mpc](http://www.boomer.com/mpc).

In November of 2024, our members met in Orlando, Florida, for lively and insightful sharing of their perspectives on the challenges and opportunities facing their firm and the profession. The discussions centered on the following topics:

- **Your Culture of Success**
  - Any successful firm today must be grounded in strategies for attracting and retaining talent and clients.
  - In this session, Steve Anderson shared a proven system for attracting, leveraging and retaining top talent and what separates remarkable strategic leaders from average leaders.
  
- **A Real-Life Decision on PE**
  - In this session, member Bill Dunton of Abacus shared his decision-making process when exploring and ultimately partnering with a private equity company.
  - Bill shared how they went about the decision and, once Abacus found a PE firm that met their needs, the items they needed to work through to ensure the partnership would be mutually profitable.
  
- **Software That Significantly Impacts Internal Processes**
  - During our Ask Your Peers session, one member asked whether other firms have recently implemented software that creates significant efficiencies for internal processes.
  - Some of the software members discussed as part of this topic include Asana for prospecting, Otter.ai, Cloud Capture, Aiwyn, Sureprep, Gather, Autire, Saasant, Uncat, and Syft Analytics.
  
- **Ask Your Peers**
  - This is time we set aside for our members to ask their peers anything on their minds and receive answers and solutions from the group. We use a mobile site to submit and upvote topics for discussion.
  - Topics discussed include the balanced scorecard and defining the path to partner.
  
- **Managing Partner Exchange**
  - Before the meeting, we asked ten members to bring an item, resource, project, technology, etc., that they developed or used internally to share with the group.
  - Some resources shared include a CPA Exam Pass program, creating a business development funnel in Microsoft Teams, and a client interest form for pre-

screening prospects.

- **Take It Back Sharing**

- The Take it Back Tool is designed to help our members document what they've learned and how they'll take it back to their firms.
- Before adjourning, members shared their plans with their peers in small groups.

As always, it's impossible to cover everything that we discussed at the last Boomer Managing Partner Circle meeting in a short summary. However, the trends and issues described in this report should give you some great insight into the challenges and solutions that managing partners are thinking about today.

### **An Invitation to Participate in The Boomer Managing Partner Circle™**

To learn more about The Boomer Managing Partner Circle™ community, please visit <http://www.boomer.com/mpc>.

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

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