

Highlights from the
**BOOMER
CAAS
CIRCLE**



2024



Highlights from the Boomer CAAS Circle™ - 2024 Fall Meeting

The Boomer CAAS Circle™ is a community of advisory services leaders helping one another develop the mindset, skillset and toolset for growing advisory services in their firms. Learn more at <https://www.boomer.com/caasc>.

In October 2024, Boomer CAAS Circle™ members met in Kansas City, Missouri, for lively and insightful sharing of their perspectives on the challenges and opportunities inherent in transforming their firms. The discussions centered on the following topics.

- **Shifting Staff Mindsets Beyond Traditional Work**
 - This facilitated discussion focused on guiding accounting staff to think beyond transactional work to adopt a more proactive, value-driven mindset.
 - We explored strategies to motivate team members to step out of their comfort zones by understanding the “why” behind the shift and learning the “how” through developing critical thinking skills.
- **AI Use Cases**
 - In this session, we explored the use of AI in the accounting profession, focusing on practical use cases and tools with integrated AI capabilities.
 - The discussion covered a wide range of AI-enabled tools and solutions available with members sharing insights on various options and experiences with different platforms.
- **Sponsor Highlights**
 - One of the benefits of our Circle communities is access to the top solution providers in our profession.
 - During this session, members heard from our three sponsors, CPA.com, Zoho, and Lease Crunch. After a brief presentation, members could ask questions and get answers to their most pressing questions.
- **Staffing for CFO and Higher-Level Engagements**
 - In this session, we explored strategies for staffing CFO and higher-level engagements by finding specialized talent, upskilling existing team members, and leveraging offshoring/onshoring for niche-specific roles.
 - We also discussed overcoming the perception of CAAS by educating firms on its evolution and creating clear career paths to support growth and change management.
- **Measuring Success Without Time Tracking**

- During our “Ask Your Peers” session, a member asked whether other firms are moving away from time tracking and how they’re measuring the success of client work internally.
- Members discussed separating time tracking from billing and other ways they’re measuring what matters.
- **Marketing CAAS**
 - During our “Ask Your Peers” session, one member asked how other firms market their CAAS services.
 - Members discussed outsourcing marketing, identifying target clients, where these clients “hang out,” and their pain points.
- **Building Out Firm-Wide Processes for CAAS**
 - During our “Ask Your Peers” session, a member shared that they’re building out firm-wide processes for CAAS and asked their peers to share their top three changes for success.
 - Ideas discussed include buy-in from the top, considering changes for the firm as a whole, and hiring an onboarding specialist.
- **The Boomer Briefing**
 - In this session, we took a fresh look at the trends that all 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 & Experimentation.

An Invitation to Participate in the Boomer CAAS Circle™

To learn more about the CAAS Circle community, please visit <https://www.boomer.com/caasc>.

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