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Highlights from the

Boomer Technology Circles

Fall 2020

Topic Highlights from The Boomer Technology Circles 2020 Fall 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 with 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.

Our Boomer Technology Circles recently met virtually. We've summarized the top ten trends that emerged from the Fall 2020 Boomer Technology Circles meetings below.

- **Key Traits of an Innovative Firm**
  - Innovation is essential for firm growth and requires investment of resources.
  - In this session, members heard real-life stories from firms that have developed an approach to inspire imaginative thinking in their people and identified the traits their firms need to develop.

- **What's in Marc's Bag (Home Edition)**
  - What does a grounded road warrior include in his work-from-home setup?
  - Marc Staut shared the setup and tech gear he's using in his home office today.

- **Sponsor Innovation Sessions**
  - Our virtual event included dedicated break-out rooms for sponsors to answer questions and provide demos for those who want to dive deeper into their solutions.
  - Avii, Inflo, Right Networks, SafeSend Returns, Sage, Star, Suralink and SurePrep shared the latest innovations they're excited about sharing with firms today.

- **Workflow Across Applications, Systems & Processes**
  - Most firms rely on a network of different people, processes and technologies to get work done. Our members discussed how they're automating workflows across a variety of applications and systems.
  - Some of the resources discussed include ILeap, CCH Axcess, Star, TeamWork, Power Automate, and UI Path.

- **Microsoft Teams Security**
  - Many firms have implemented Microsoft Teams for chat and collaboration, but some IT leaders are concerned about security. Members discussed the controls they're putting in place to ensure data security.
  - The discussion covered team governance, auto encryption and file sharing.

- **Becoming Truly Digital**
  - When firms were forced to work remotely this year, many realized that their "paperless" processes included a lot of paper. How are they changing their processes to become more digital versus just "less paper?"
  - Members discussed their plans for digital workflows and managing the front door and front-end scanning when clients insist on paper delivery.

- **Work-from-Home for the Long Haul**
    - Members discussed how their teams are dealing with work-from-home since it will likely continue for the long term.
    - Some notice that collaboration is down and are focusing on creating intentional pathways to collaboration and setting aside time for connections and communication.

- **Effectively Aligning IT Strategy with Overall Firm Vision**
    - Now, more than ever, firms need to leverage technology to accelerate success and achieve their business goals. To do that, they need to align technology strategy with business objectives.
    - In a peer-led discussion, our members discussed how to get IT strategy, firm planning, and the innovation pipeline in alignment, establishing an IT steering committee, and measuring the effectiveness of projects.

- **Creating a Successful Communication Plan**
    - Solid communication is critical to the success of any roll-out of a new process or technology.
    - We discussed how to build a successful communication plan and why leveraging the firm's marketing resources can help!

- **Staffing the Help Desk**
    - Some of our member firms are having trouble staffing their IT help desks during the pandemic.
    - Members discussed how they are hiring and training people and helping remote employees get integrated into firm culture.

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

An Invitation to Participate in The Boomer Technology Circles™

Our next round of Boomer Technology Circles meetings will take place May 11 – 14, 2021. To learn more about the Boomer Technology Circles communities, please visit http://www.boomer.com/btc.

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