

Highlights from the

Boomer Process Circle

Spring 2021

Highlights from the Boomer Process Circle™ – 2021 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 2021, 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:

- **New Name!**
 - The Boomer Lean Circle is now the Boomer Process Circle!
 - This name change reflects our members' commitment to all aspects of process improvement beyond Lean Six Sigma.
- **Mid-Year Process Trends**
 - Members heard a tax season debrief from the Boomer Technology Circles followed by small group discussions on lessons learned since our last meeting, then shared the key trends they discovered with the larger group.
 - Discussions centered around the progress firms have made in leveraging opportunities created by our external environment, technology, clients, staff, etc.
- **How to Use Metrics to Influence Change**
 - Raw data gives you raw information — not necessarily the knowledge needed to make better business decisions and influence change.
 - In this session, Schneider Downs shared how they developed their employee dashboards, including the objectives of the dashboards, the development process, key takeaways and future initiatives.
- **Accountability Review**
 - Setting goals and holding yourself and your team accountable is critical to the success of any initiative.
 - During our Accountability Review, members work in small groups to look back on the progress they've made since the last meeting. By holding each other accountable, we achieve results beyond what most would accomplish on their own.
- **Tools and Tips to Help Manage Staff While Working Remotely**
 - Members discussed how they're keeping team members motivated and sharing knowledge while they continue to work remotely.
 - Some of the ideas shared include weekly or daily meetings to review workloads, scheduling time to eat, take a walk, stretch, etc., and increasing the frequency of coaching conversations.

- **Defining “Top Clients” Aside from Billable Hours**
 - During our session on using metrics to influence change, members had a chance to ask questions about the topic. One question that popped up is how firms define their “top clients” aside from hours.
 - Some of the ideas our members shared include weighting clients by number of hours and ranking clients by number of hours with lowest realization first.
- **Sponsor Innovation Sessions**
 - Members chose to attend one of two sessions hosted by sponsors to learn how savvy solution providers are focusing on innovation and continuous improvement.
 - Amelio discussed process management versus workflow while Pax8 discussed data management.
- **Travel Policies**
 - With more of the country opening back up from pandemic shutdowns, we discussed whether our members would be willing and able to travel to our next meeting in August.
 - Poll results show that 83% of firms are allowing employees to travel for conferences and events in 2021 and 87% will be able to travel for conferences and events by August of 2021. When asked whether they would prefer to attend the upcoming meeting virtually or in-person, 43% prefer virtual, 57% prefer in-person.
- **90-Day Game Plan Preparation and Review**
 - We never want our members to leave without providing an opportunity to reflect on what they've learned and document their action plan.
 - 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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