

Highlights from the

Boomer CIO Circles

Fall 2020

Topic Highlights from The Boomer CIO Circle™ 2020 Fall Meeting

The Boomer CIO Circle™ is a community of IT leaders from forward-thinking firms who are committed to aligning technology and strategy at the highest levels. Members focus on developing the skills necessary to improve leadership beyond technology. Learn more at www.boomer.com.

This February, our members met virtually for lively and insightful discussion, sharing their perspectives on the challenges and opportunities facing their firm and the profession.

- **Clarifying Your Message**
 - Whether it's a firmwide technology project, a special project for a department, or even launching external technology services, how you communicate value is vitally important.
 - In this session, members learned a simple and powerful messaging framework to help them cut through the noise and have people pay attention to what they're communicating.
- **Clarifying Your Message Breakout Groups**
 - After learning about the messaging framework, members broke into small groups to give their messaging the "grunt test," and work on an internal messaging campaign.
 - Participants are encouraged to partner with their marketing departments after the meeting, read Building a Story Brand by Donald Miller, and attend messaging workshops.
- **Emerging Technologies and Hype Cycles**
 - In this session, we covered the latest trends in accounting firms focusing on disruptive technologies set to make a significant impact on the profession.
 - Some of the technologies we discuss include Formative AI, Composite Architecture, Algorithmic Trust, Beyond Silicon, and Digital Me.
- **Book Discussion – Your Top 10!**
 - Before the meeting, we surveyed members to get feedback on their top 10 books that have helped them grow and succeed as a CIO.
 - We ranked the books, and participants discussed their picks and others that didn't make the list.
- **CIO Exchange/Accountability Review**
 - Interactive roundtable discussion on members' top three strategic projects.
 - The group shared best practices from real-world experiences in implementing Microsoft Teams, RPA, dashboards, security, document management and more.
- **Scrum: The Art of Doing Twice the Work in Half the Time**
 - Participants were asked to read this book by Jeff Sutherland prior to the meeting and come prepared to discuss.

- Members discussed how the book resonated with them and ideas from the book they plan to implement in their own teams.
- **Future Planning**
 - Members discussed key takeaways from the Fall meeting and ideas for the future.
 - Discussion of topics for webinars and sessions in 2020, including innovation as a process, IT budgets, IT staff counts and department structures and more.
- **Cloud-Based Phone Systems**
 - With more people working from home, many firms are moving away from desk phones to a cloud-based phone system.
 - Members discussed different cloud-based systems, features and functionality, and cost.
- **Stipends for Work-from-Home Equipment**
 - How are firms handling the costs of additional equipment needed by employees while working from home? Things like headsets, desk chairs, standing desks, monitors, docking stations, etc.
 - Some firms are providing monthly stipends, some a one-time allowance. Discussed reimbursements, stipends, discount programs and more.
- **Wolters Kluwer's Acquisition of XCM Solutions**
 - Members discussed the acquisition of XCM Solutions by Wolters Kluwer.
 - How will this impact our firms and the profession?

It's impossible to cover everything that we discussed at the last Boomer CIO Circle meeting in this short summary. However, the trends described in this report should give you some great insight into the technology challenges and solutions that firms are thinking about today.

An Invitation to Participate in The Boomer CIO Circle™

To learn more about the Boomer CIO Circle community, please visit www.boomer.com/CIO.

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