

High-Growth CPA Consulting Firm Leverages Team Through Delegation to Improve Focus & Effectiveness



A Client Case Study

Client: CPA Consulting Firm

Boomer Consulting
Kansas City, MO

delegate^{*}
Strategic Support™ | Freedom Found

About Delegate Solutions:

We provide consultative executive support for entrepreneurial leaders and their teams. We help them leverage their time through delegation and provide a dedicated support team to help them create more freedom to do what they love and have a big impact.

Executive Summary

Jim Boomer, CEO of Boomer Consulting, Inc., is an expert on managing technology within an accounting firm and acts as a strategic planning and technology consultant and firm adviser to CPA firms across the country.

When Jim came to Delegate, his organization was experiencing tremendous growth, and also shifting the way that the organization worked with clients. To maintain his team's energy and focus through the growth process, he wanted to make sure that both he and his team were working in their Unique Abilities®. Jim and his team knew that they needed to quickly enlist help as they grew, but didn't have a clear picture around how they could best to utilize an Assistant to leverage their time and focus as a group.

Jim agreed to be the first on his team to work with an Assistant in this way. When his senior team began to see how well the delegation worked, and how much more responsive, prepared and engaged Jim was because of this help, they enlisted the same help. The rest of the senior team at Boomer dove right in to delegating and discovered how they could utilize this additional support to give them more freedom to focus on their most important work.

Client Challenges

Jim came to Delegate knowing he needed to hand off some tasks, but needed to have the confidence that once they were taken over, they would be completed to his standards, efficiently and without errors. He admittedly had to take a “leap of faith” as our associates started taking over things like email and calendar management. However, once he started to experience the relief of having time-consuming admin tasks taken off his plate, his team noticed an increase in his preparation, engagement and he reported that he was now able to focus fully on more high-value tasks.

How Our Service Helped

Once we completed our onboarding and created Jim’s Strategic Action Plan, we set out to identify the “low-hanging fruit”, or tasks that were easily repeatable and delegatable. After identifying our next best steps, the team got to work confirming access to all necessary tech platforms. We then took over basic administrative tasks such as inbox and calendar management, task management and extensive travel planning, while creating process documentation each step of the way to capture preferences and nuances surrounding each task.

Our team began to expand support by managing data input and refresh in the company’s CRM (ZenDeskSell). We facilitated preparation of KOLBE Assessments for the Boomer Community. Our team began summarizing and preparing survey metrics for clients, and worked on a “Digital Office Project”, helping the Boomer Community go “paperless”. Our team also helped out with social media posting, meeting and engagement preparation and White Paper formatting, in order to free Jim and his team up to focus on the big-picture, high-value work.

Results, Return on Investment and Future Plans

With the Delegate Team fully engaged in Jim’s day to day administrative tasks, his team saw great value in utilizing our strategic support services, and decided to extend the support to other members of his leadership team. By bringing on more Delegate Associates to support the team, we are able to truly leverage their time so that the work they are doing is within their Unique Abilities.

Jim has big growth goals for the company - specifically shifting from 1:1 consulting to group coaching. With the help of the Delegate team across the Boomer Community, he is able to focus more on his growth plans and think more strategically, instead of being bogged down by handling the important administrative/project management tasks that keep the organization moving forward. Once our team was in place providing strategic support, Jim started to get feedback from his team and from clients about his responsiveness, his preparedness, and his engagement at meetings, because he wasn't overloaded with busy work. Our work with Jim freed him and his team up to focus on the most important things.

Client Testimonial



“I knew I was onto something with Delegate Solutions when I started to get more feedback from the team and from clients about my responsiveness, my preparedness, my engagement, and meetings. With their help, I wasn't overloaded with a bunch of busy work, which then freed me up to focus on the most important things as we grew. -- Jim Boomer, CEO

Tools and Technology Utilized

