

Highlights from the

# BOOMER LEARNING & DEVELOPMENT CIRCLE

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# 2024



## Topic Highlights from The Boomer Learning & Development Circle 2024 Fall Meeting

The Boomer Learning & Development Circle is a community of learning and development leaders from forward-thinking firms who are committed to aligning their firm's learning training initiatives with firm strategy. Learn more at [www.boomer.com](http://www.boomer.com).

In September of 2024, our Boomer Learning & Development Circle members met in Kansas City, Missouri, to share knowledge and build relationships with peers. The discussions centered around the following topics:

- **AI and Automation**
  - In this session, we defined artificial intelligence (AI) and automation and discussed why they matter for accounting firms in terms of scalability, personalization, and efficiency.
  - We also discussed current trends in AI and automation in learning and development and broke into groups to discuss how firms are using these tools today and what new solutions or applications they're exploring.
- **Integrating Coaching and Training Together**
  - This session explored how learning, performance, and talent management intersect.
  - We discussed using tech to connect these areas, creating personalized learning plans from performance reviews and the role of post-training coaching.
- **ROI for L&D**
  - In this session, we explored the key metrics for tracking and showing the ROI of training programs and L&D initiatives.
  - We discussed how to tell whether improvement in the metrics results from L&D, shared scorecard templates, and reviewed insights from a pre-meeting survey.
- **L&D Exchange**
  - Several member firms were asked to present a project they implemented in their firms to the group.
  - Resources shared include a technical mentor program and Plaud.ai
- **LCVista**
  - Many of our member firms use LCVista for CPE compliance.
  - Members discussed tips and tricks they've discovered while using this tool, including integrating LCVista, Teams, and Conferences.io.
- **Start, Stop, Continue in 2025**
  - It's difficult to make progress on goals if we're not focused on the right areas. During our Ask Your Peers session, members discussed what they plan on starting, stopping, and continuing in 2025.

- One of our members mentioned they're trying to eliminate anything focused on hours. Other ideas include learning to say No to focus on quality rather than quantity.
- **Sponsor Highlights**
  - Identifying new solutions and systems is a big part of the success of our firms.
  - We heard from our vendor's thought leaders about trends related to client experience, communication, accountability and other challenges firms face. Following the presentation, we opened the floor to Q&A.
- **Take It Back Sharing**
  - Personal planning time is essential for everyone; our L&D group is no different. Members shared their takeaways from the meeting and the actions they plan on taking in the next six months.
- **Encouraging New Associates to Start the CPA Journey**
  - Passing the CPA exam is a significant milestone for aspiring accounting professionals. It demands extensive preparation, dedication and focus.
  - Our members discussed how they encourage and support new team members on this journey, including mentor teams and cash bonuses.

Of course, it's impossible to cover everything we discussed at the Boomer Learning & Development Circle meeting in this short summary. However, the trends described in this report should give you some great insight into the L&D challenges and solutions that firms are thinking about today.

### **An Invitation to Participate in The Boomer Learning & Development Circle™**

To learn more about the Boomer Learning & Development Circle community, please visit [www.boomer.com/lcd](http://www.boomer.com/lcd).

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