

Highlights from the

Boomer Talent Circle

Topic Highlights from The Boomer Talent Circle 2025 Fall Meeting

The Boomer Talent Circle is a community of talent leaders from forward-thinking firms committed to aligning human resources and firm strategy at the highest levels. Members focus on elevating their knowledge to improve leadership beyond HR compliance. Learn more at www.boomer.com.

In September 2025, our Boomer Talent Circles met in Kansas City, Missouri, to share knowledge and build relationships with peers. The discussions centered around the following topics:

- **Elevating HR's Role in Strategic Planning**
 - Members explored how HR can move from tactical execution to strategic influence by aligning people initiatives with firm goals.
 - Discussions emphasized demonstrating business impact, building relationships with leaders and using measurable results to secure HR's seat at the planning table.
- **Creating a Culture of Open and Honest Feedback**
 - Participants examined strategies to foster transparency and accountability through structured feedback systems.
 - Key themes included training managers to deliver consistent feedback, separating performance from personality and promoting upward communication across all levels of the firm.
- **Optimizing HR Through Technology and Data**
 - Members shared how HR technology reshapes operations, from analytics dashboards to integrated systems.
 - The session encouraged firms to assess tech adoption barriers, improve data visibility and use analytics to inform talent decisions and business planning.
- **Reimagining Value Beyond Billable Hours**
 - Members explored how to drive performance and engagement without relying solely on billable hours as the measure of success.
 - The conversation emphasized shifting mindsets, helping employees understand their role in the firm's bigger picture, aligning culture and core values and recognizing contributions that strengthen the business even when not directly billable.
- **Building an HR Playbook for Mergers and Acquisitions**
 - Firms exchanged insights on managing the human side of mergers and acquisitions, emphasizing the importance of structure, communication and empathy throughout the transition.
 - Members shared how clear playbooks help streamline integration, ensure due diligence across departments and support cultural alignment from day one.

- **Bridging Generational Expectations Around Work-Life Balance**
 - Members discussed shifting priorities across generations in public accounting, with younger professionals placing greater emphasis on flexibility and balance.
 - The group examined the persistent tension between traditional hour-based expectations and emerging values focused on purpose, autonomy and well-being.
- **Innovation in Learning and Development**
 - Firms showcased creative approaches to talent development, from digital learning platforms to internal coaching programs.
 - These new approaches are designed to accelerate readiness for advisory roles and enhance long-term retention.
- **Collaboration and Peer Exchange**
 - During the Talent Circle Exchange, members presented real-world projects such as onboarding redesigns, performance dashboards, and internal communication hubs.
 - The open discussion format sparked idea sharing and practical solutions firms could adopt immediately.
- **Sponsor Insights**
 - Sponsors from Miles Talent Hub, Gr8 Global, UWorld and Spiirall by LCVista shared trends and tools for enhancing communication, accountability and professional growth.
- **Take It Back Commitments**
 - Each participant identified a key action to implement within their firm, ranging from HRIS integration and data dashboards to feedback systems and leadership alignment.
 - These commitments ensure the lessons from the meeting lead to tangible results before the next Circle.

Of course, covering everything we discussed at the Boomer Talent Circle meeting in this short summary is impossible. However, the trends described in this report should provide you with valuable insights into the talent challenges and solutions that firms are thinking about today.

An Invitation to Participate in The Boomer Talent Circle™

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

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