

Highlights from the

# BOOMER LEARNING & DEVELOPMENT CIRCLE

---



# 2024



[boomer.com/lcd](https://boomer.com/lcd)

## Topic Highlights from The Boomer Learning & Development Circle 2024 Winter 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 February 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:

- **LCVista and Intentional Learning Plan Development**
  - In this workshop, we heard from technology partner LCVista on learning plan best practices and development tips.
  - We also heard real-life stories from a panel of power users and broke into small groups to share member firms' learning plans.
- **Leveraging AI and Gamification**
  - In this session, we heard about some up-and-coming technologies in the L&D world.
  - Our session focused on platforms that leverage gamification and AI to drive engagement.
- **Top Trends for 2024**
  - During this session, we shared the top trends impacting L&D and what our members should look for in the coming year.
- **L&D Exchange**
  - Several member firms were asked to present a project they implemented in their firms to the group.
  - Resources shared include firmwide conferences and revamping a firm's leadership program.
- **Automated Processes in Onboarding**
  - One question asked during our "Ask Your Peers" session was, "What automated processes, if any, exist in your onboarding initiatives?"
  - Group members shared the automation they use, such as technology training, tools within the firm's HRIS, and automating new hire paperwork.
- **Engagement in a Hybrid Environment**
  - Keeping employees engaged takes intention in a remote or hybrid team.
  - During our open Q&A session, members discussed how they promote engagement among new hires and experienced employees. Some ideas discussed include supervisor training and creating psychological safety within the organization.

- **Retaining the Talent You Have**
  - Hiring is only one piece of the talent puzzle. Your talent attraction efforts will only go so far if existing employees leave as fast as you can hire new ones.
  - Members discussed methods to improve retention, including creating a “Talent Advisor” position and focusing on results rather than hours.
  
- **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.
  - Some of the takeaways our members shared include catering to all learners in the firm, more frequent communications, and nano learning for today's environment.
  
- **Involving L&D in Performance Reviews**
  - One of our members asked how other firms involve L&D in employee performance reviews.
  - Our members discussed whether their firms involve L&D and how they're handling it. For example, some firms provide management training to encourage it.
  
- **External Leadership Development**
  - External leadership development programs and provide valuable growth opportunities for team members. So, how do our member firms identify or select team members to participate in these programs?
  - Some ideas include taking partner recommendations and using spreadsheets to identify high-potential people.

Of course, it's impossible to cover everything that 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).

### **About Boomer Consulting, Inc.**

Boomer Consulting, Inc. provides consulting services to hundreds of the highest performing CPA firms. Our unique and powerful solutions target five areas critical to a firm's success: Leadership, Talent, Growth, Technology and Processes. For more information, visit [www.boomer.com](http://www.boomer.com).