

Highlights from the
**BOOMER
TALENT
CIRCLE**



2024



Topic Highlights from The Boomer Talent Circle 2024 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 2024, our Boomer Talent Circle members met in Kansas City, Missouri, to share knowledge and build relationships with peers. The discussions centered around the following topics:

- **The Employee Journey: Driving Success Through Every Stage**
 - This workshop explored the seven stages of the employee lifecycle, from recruitment to onboarding to career transitions and engagement with former employees.
 - Attendees shared best practices and lessons learned in driving individual and organizational success.
- **Talent Exchange**
 - Prior to the meeting, we asked several firms to prepare a presentation introducing a project they implemented in their firms.
 - During this session, members shared the best practices and benefits they've discovered from their talent project implementations.
- **Sponsor Highlights**
 - Identifying new solutions and systems is a big part of the success of our member firms.
 - During this session, members heard from our sponsors about trends related to client experience, communication, accountability, and other challenges facing the profession before opening the floor to Q&A.
- **Navigating the New Hire Journey: Effective Orientation and Onboarding Strategies**
 - This panel discussion highlighted the essential components of employee orientation and how it differs from the broader onboarding process.
 - Participants gained insight into what other firms are currently doing to make their orientation and onboarding programs more effective and enjoyable.
- **Recruiting Strategies**
 - During our "Ask Your Peers" session, a member asked about what other firms are doing to attract talent in today's competitive market.
 - Some strategies include highlighting employee experience on social media, LinkedIn recruiting, hiring an internal communications professional, and employee referrals.
- **Initial Training and Development**
 - One of our members asked how other firms identify and address specific training needs of new employees.

- In response, members shared ideas like a formal learning path for new hires and skills development trackers.
- **Managing Burnout**
 - Accounting has always been demanding, but burnout has jumped significantly in recent years.
 - Members discussed how they prevent and manage burnout for their top performers, including capping hours and employee assistance programs.
- **Handling Transitioning Clients**
 - One of our members wanted to know how their peers handle transitioning a book of clients to another team member.
 - Members discussed creating checklists for transitioning clients, training the new responsible team members, and leadership training.
- **Alumni Relations**
 - When an employee leaves the firm, it can be tempting to simply move on. However, there are many benefits to maintaining a positive relationship after the employment separation, including the potential for the employee to return to the firm at some point.
 - Members discussed how they maintain contact with alumni employees. The group's ideas include a quarterly newsletter, inviting them to happy hours and bonuses for referring other employees or clients.

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 give you some great insight 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.

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.