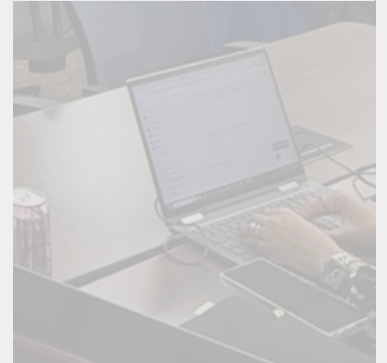
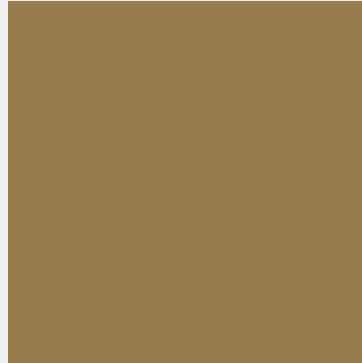
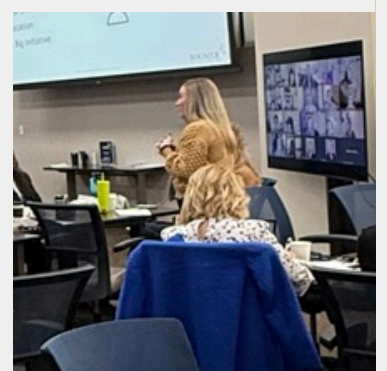
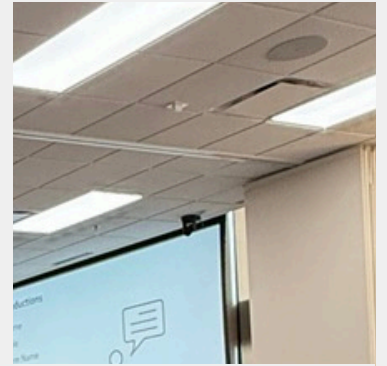


2026

Highlights from the **Boomer Talent Circle**

Essential insights and takeaways from the latest Circle meeting that help your firm stay aligned, informed, and prepared for what comes next.



Topic Highlights from The Boomer Talent Circle - 2026 Spring 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 February 2026, 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:

- **2026 Trends**
 - Talent leaders must anticipate how AI-first cultures, redesigned operating models and rising profitability expectations will reshape roles, development and retention strategies across their firms.
 - In this session, our consultants guided members through five macro trends for the coming year, including AI governance as a leadership imperative, role redesign for scalable growth, profitability as a performance benchmark and the need for fundamentally different talent systems where middle leaders orchestrate outcomes and development becomes continuous, targeted and role-based.
- **HR Best Practices for Mergers & Acquisitions**
 - As firms pursue growth through mergers and acquisitions, talent leaders play a critical role in safeguarding culture, reducing risk and ensuring a smooth transition for employees on both sides of the deal.
 - This facilitated discussion covered building and refining the HR components of an M&A playbook. We highlight essential due diligence steps, common red flags, best-practice communication strategies and methods firms use to identify gaps and strengthen cross-departmental alignment during integration.
- **Sponsor Highlights**
 - Talent leaders must continuously evaluate new platforms and service models that enhance the employee experience, strengthen communication and improve accountability across the firm.
 - During this session, representatives from MyCPE One, Beech Valley, LCVista and Miles Masterclass shared their thoughts on emerging trends, technology-enabled learning, flexible talent models and workforce development solutions. Following their short presentations, we opened the floor to a Q&A focused on how these tools can address real-time challenges within member firms.
- **From Change Fatigue to Change Fluency**
 - Talent leaders are often the first to feel the strain of change fatigue, so they must understand how repeated transformation efforts impact morale, trust and the firm's ability to execute strategy effectively.

- This discussion centered around what's really happening on the front lines, aligning leadership messaging with operational reality and building the adaptive muscle required to move from reactive change to sustained change fluency.
- **Workforce Planning Best Practices**
 - Effective workforce planning is no longer optional. Talent leaders must proactively align staffing models, leadership pipelines and HR processes with the firm's long-term strategy to avoid reactive hiring and capacity shortfalls.
 - This session featured facilitated peer sharing and round robin discussions focused on integrating workforce planning with firm strategy, strengthening collaboration between HR and operations and leveraging tools and forecasting techniques firms are using to anticipate skills gaps, succession needs and evolving workforce demands.
- **Engagement Strategies That Go Beyond Billable Hours**
 - When we measure engagement primarily through billable hours, we risk overlooking the deeper drivers of retention, performance and cultural health that talent leaders are responsible for strengthening.
 - In this session, members discussed how to identify the root causes of disengagement, evaluate how current practices and metrics may unintentionally contribute to burnout and develop short-, mid- and long-term action steps along with communication tools that connect employees to firm strategy, values and their individual impact.
- **Talent Circle Exchange**
 - Talent leaders accelerate progress when they learn directly from peers who are testing new workforce strategies, implementing systems and navigating complex transitions in real time.
 - During this interactive exchange, members shared case studies and lessons learned from initiatives like HRIS implementations, remote and hybrid readiness strategies, performance management redesign, AI training programs, workforce planning efforts and rebranding projects to strengthen employer brand and firmwide alignment.

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 valuable insight into the talent challenges and solutions firms are considering 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.