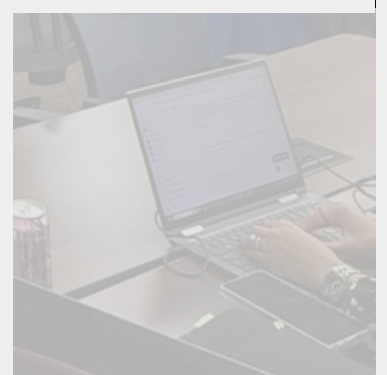
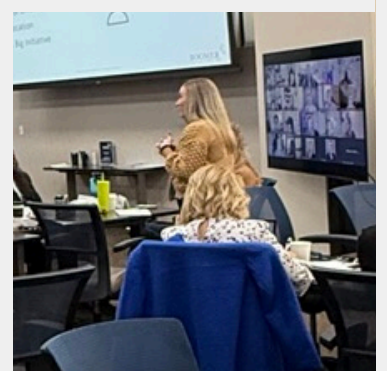
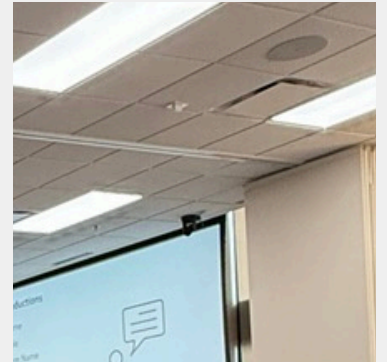


2026

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.



Highlights from the Boomer Talent Circle™ 2026 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/tc.

This September, members met at the Accounting Innovation Center in Kansas City, Missouri, to share knowledge and build relationships with peers. Discussions centered on the following topics.

- **Helping Partners Navigate Change**

- Partners tend to agree on strategy at a retreat, then go back to their teams and resist the change they endorsed. That leaves Talent leaders spending the following months re-selling decisions the partners already made.
- In this session, Leanne Radcliffe, Chief Talent Officer at RLB, shared how her firm developed a two-day partner training course focused on real operational challenges. Partners developed 17 standards, evaluated their readiness to implement them and worked through concerns to build stronger alignment and accountability.

- **Strategic HR & Talent: Designing Future-Ready Leadership and Teams**

- As firms grow and become more complex, Talent leaders are rethinking how HR teams are structured, which responsibilities they should own and how to create capacity for more strategic work. The right model depends on the firm's needs, not simply its employee headcount.
- This panel discussion featured Jess Camp of AdamsBrown, Marc Harvey of Rea, Heather Fuller of HoganTaylor, and Adam Hoffman of Porte Brown. Panelists described stepping into leadership and board meetings and assigning Talent Advisors by department or location.

- **Sponsor Highlights**

- Tools and vendors shape how firms recruit, pay, train and extend capacity, so Talent leaders benefit from hearing directly from the providers they may rely on.
- This session introduced Gusto, Finsmart and UWorld, who each had five minutes to share their solutions with our members. Attendees continued conversations with sponsors through breaks and the social reception.

- **Talent Circle Exchange**

- Talent leaders at different firms tackle the same projects, from benefit costs to AI adoption, and each firm repeats the learning curve unless peers share what worked.
- This session took five volunteers through project showcases, including a Copilot 101 training built from short LinkedIn Learning videos and hands-on Excel exercises, Copilot agents that connect the firm handbook to Department of Labor sites to answer leave and benefits questions in minutes, and an internship ROI analysis showing 380 interns, 102 conversions, and 68 still employed.

- **Compensation Philosophy and Bonus Structures for a Multi-Service Firm**

- As firms add service lines, pay practices drift apart, partners worry about what transparency does to expectations, and team members compare internal ranges with agency guides and competitor websites.
- In this session, three member firms shared their approaches to compensation and bonuses and how they tie them to performance.

- **Measuring Performance Beyond Billable Hours**

- Firms that move toward value billing lose the hours-based metrics they use to plan capacity, set expectations and evaluate people, so Talent leaders need new KPIs before the change arrives.
- In this session, peers shared where their firms stand. One Circle firm plans to retire timesheets by 2030, another introduced value billing to its owners in May and ran workshops in August, and a group of principals at another firm is researching it through a leadership academy.

- **Hiring Assessments in the Age of AI**

- As candidates increasingly use AI in academic work and hiring assessments, Talent leaders are questioning how to accurately evaluate technical skills and readiness for entry-level accounting roles.
- Participants compared the tools their firms use, including Wonderlic, a reference check tool, Predictive Index, Kolbe, and DISC. One member noted Predictive Index shows personality and drive but leaves technical skill untested, so he asked peers to share their experience with AccountTests. Another attendee reported that professors at a career fair urged firms to add a technical task to in-person intern interviews, such as reading a basic financial statement.

- **Defining Flexibility and High Performance**

- As employee expectations around flexibility evolve, firms are working to balance individual scheduling preferences with collaboration, availability and performance standards. Talent leaders are helping clarify what flexibility means in practice while shifting conversations toward quality, accountability and outcomes.
- One member asked what flexibility means in practice, since firms say they offer it without defining whether it covers hours, when or where people work, and candidates say they want work-life balance over pay. Another member described employees who go to the gym midday and finish work in the evening, which frustrates leaders who expect availability. Peers answered that the right expectation depends on whether the work needs collaboration, and that a shift from hours to quality and outcomes makes the conversation easier

It's impossible to cover everything we discussed at the Talent Circle in this short summary. 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.

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