



# INSIDE THE TALENT CIRCLE

# TRENDS

## A Look Inside the Talent Circle

This resource offers a behind-the-scenes look at how members of the Boomer Talent Circle work through real challenges together. It captures the conversations, questions, and peer insights shaping how firms are thinking about talent, capacity, and growth.

## The moment that triggers the conversation

Does any of this sound familiar?

“We say we want accountability, but no one agrees on what ‘good’ actually looks like.”

“We’re reacting to hiring needs instead of anticipating them.”

“Our growth goals don’t align with our current talent pipeline.”

“We’ve talked about workforce planning, but nothing has really stuck.”

At a recent Boomer Talent Circle meeting, this conversation began when a member shared that their firm’s lack of workforce planning was putting real pressure on growth and constraining capacity.

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### **What's changing: Trends Circle members are reacting to**

Members of the Talent Circle are human resources and talent professionals from forward-thinking firms around the country. They're seeing signals.

### **Workforce planning needs to be a continuous discipline rather than an annual exercise**

According to McKinsey, 73% of organizations conduct full operational workforce planning, but only a small share link their strategies to future skill needs. With the rapid changes driven by AI and automation, strategic workforce planning can't be a one-and-done exercise. Firm leaders need to continuously refine their plans based on real-time data and ongoing monitoring.

### **Hiring alone can't solve capacity gaps**

Fewer students are majoring in accounting, fewer candidates are sitting for the CPA exam, and the AICPA has stated that roughly 75% of its members are at retirement age. Competition for talent is fierce, and firms are increasingly looking beyond their immediate area to find candidates with the right skills. This makes hiring even more challenging and forces firms to consider alternatives like process improvement, AI, automation and outsourcing.

### **Firm strategy evolves faster than the talent model can keep up**

A Gartner survey revealed that 48% of HR leaders agreed the demand for new skills is evolving faster than existing talent structures and processes can support.

### **Informal planning is breaking down under growth and complexity**

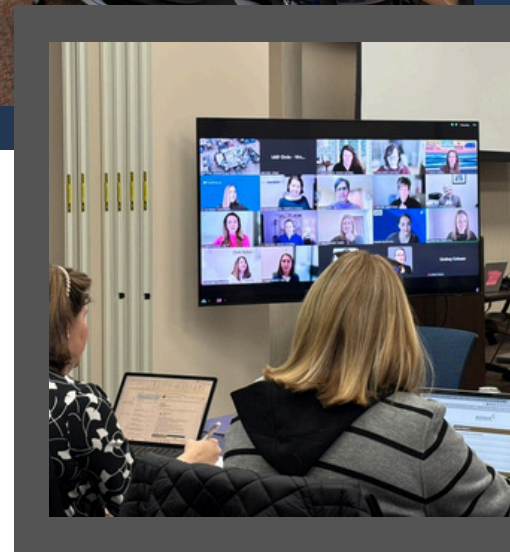
According to Gartner, only 8% of organizations have reliable data on the skills their workforce currently possesses and those that have the greatest impact on business success.

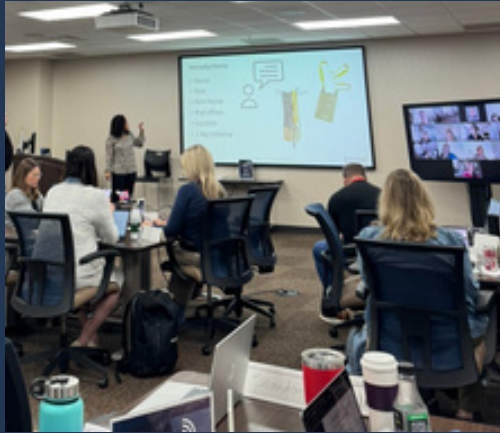
### **Shifts redefining talent strategy in accounting firms**

Circle members don't look for a single "right" framework. Instead, they challenge each other by asking questions like:

- Do we actually know what roles we'll need 12 to 24 months from now?
- Where are we consistently under- or over-resourced, and why?
- How tightly is our workforce plan tied to firm strategy?
- Are we solving problems with hiring when we should be solving them with structure or development?

These questions uncover gaps in thinking faster than any template or list of best practices ever could.





### Why this works better in a peer community

Talent leaders can and do plan for their firm's workforce needs on their own. But inside a Circle community, something different happens.

They learn how peer firms structure their approaches and see what actually works. They pressure-test assumptions before rolling them out. And they build shared language around talent, capacity and growth.

This is what it looks like when leaders work through real challenges with peers who've already been there. Ideas move from abstract to actionable.



### What effective talent leaders do differently

A few patterns emerge among firms making meaningful progress.

1. **They treat workforce planning as a leadership conversation.** They ensure firm leaders are actively involved in defining talent needs rather than delegating it entirely to HR.
2. **They connect workforce decisions directly to firm strategy and growth goals.** They align hiring, development and role design with where the firm is growing, not just where it is today.
3. **They build simple, repeatable processes instead of overengineering models.** Practical approaches their teams will actually use are better than complex frameworks that stall out.
4. **They focus on visibility, understanding capacity, not just headcount.** They prioritize knowing who can do what work and when, rather than relying solely on total staffing numbers.

## See How These Conversations Turn Into Action

This is how the Boomer Talent Circle works. Members bring real challenges into the room, learn from peers who've been there and leave with clearer direction. This process helps them make better decisions, faster.

[Join us in the Talent Circle.](#)

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