



INSIDE THE LEARNING & DEVELOPMENT CIRCLE TRENDS

Inside the Learning & Development Circle

This resource offers a behind-the-scenes look at how members of the Boomer Learning & Development Circle work through real challenges together. It's a snapshot of the thinking, questions and peer insights that drive better decisions.

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."

"Our managers have different expectations for the same role."

"Employees keep asking, 'What do I need to do to get to the next level?' and we don't have a clear answer."

This is where the conversation started inside a recent Learning & Development Circle meeting. Leaders realized they were making talent decisions based more on instinct than shared definitions.

Some described their thinking as,

"They're not acting like a senior yet."

"They don't show leadership."

"They're not ready."

But when pressed, no one could clearly define what those statements actually meant. That's where the conversation began.

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What's changing: Trends Circle members are reacting to

Members of the L&D Circle are learning and development professionals from forward-thinking firms around the country. They're seeing signals.

Undefined expectations are a talent retention risk

The most fundamental element of employee engagement is knowing what's expected of you, according to Gallup. High performers won't stay where growth feels subjective.

Promotion decisions are under a microscope

Fairness is an operating requirement in the workforce today. According to research cited by HR Daily Advisor, nearly three-quarters of managers reported that at least some of their people decisions were formally challenged in the past year. Firms can't afford inconsistency or perceived favoritism.

Learning without context isn't working

Learners who set career goals engage with learning four times more than those who don't set goals, according to a LinkedIn Learning study. Training programs fall flat when employees don't know what they're developing toward.

Career paths need to feel real, not theoretical

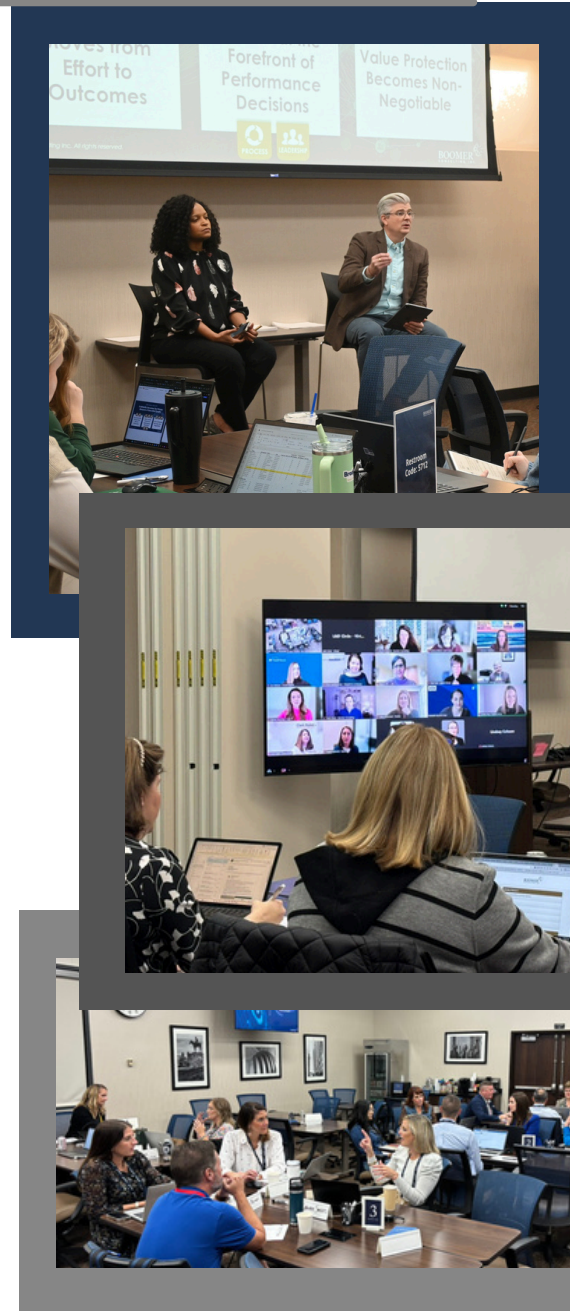
Only one in four employees strongly agrees that they feel confident about their career path, according to a report from HR Leaders Monthly. Employees expect clarity on what success looks like at every level.

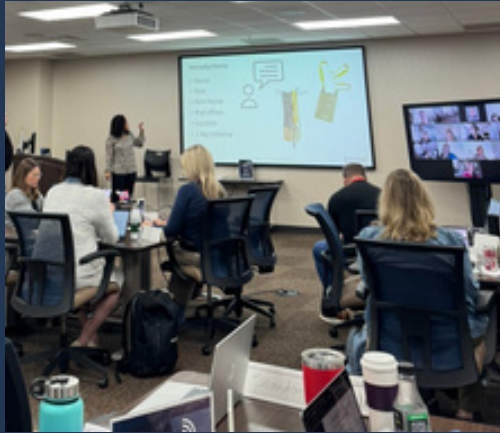
Shifts redefining L&D strategy in accounting firms

Circle members rarely jump to solutions. Instead, they challenge each other to ask better questions, like:

- What behaviors actually define success at each level? Not personality traits, but observable actions.
- Where do expectations break down today? Are managers inconsistent? Are job descriptions vague? What's going on during promotion conversations?
- If two leaders evaluated the same person, would they agree? If not, the system isn't clear enough.
- Are you building this for HR or for operators? If partners and other executives don't use it in real decisions, it won't stick.

These prompts shift the conversation from "we need competencies" to "we need to get firm leaders aligned around what success looks like in real life."





Why this works better in a peer community

Learning and development leaders can and do build competency models on their own. But inside a Circle community, something different happens.

Members hear how other firms actually apply best practices. They uncover blind spots faster by comparing approaches. They pressure-test ideas before rolling them out internally and develop shared language to make implementation easier.

This is what it looks like when leaders work through real challenges with peers who've already been there.



What effective L&D leaders do differently

A few patterns emerge across firms that are getting these decisions right.

- 1. They define success in behaviors, not generalities.** For example, the person they promote isn't just a "good communicator." They identify what good communication looks like at each level.
- 2. They involve multiple perspectives early.** High-performing firms don't build this in isolation. They pressure-test expectations across levels and roles.
- 3. They connect competencies to real decisions.** Promotions, hiring and performance conversations all tie back to the same framework.
- 4. They prioritize clarity over complexity.** The goal is a usable model.
- 5. They use expectations to evaluate performance and build confidence in team members.** When done well, expectations help employees understand where they stand and what's next.

See how the conversation unfolds

This is how the Boomer Learning and Development Circle works. Members don't just get templates and certainly not one-size-fits-all answers. They take part in conversations with other professionals who understand their opportunities and challenges. And these conversations help them make better decisions, faster.

[Join us in the Learning and Development Circle.](#)

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