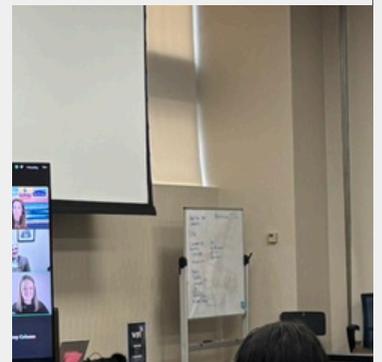
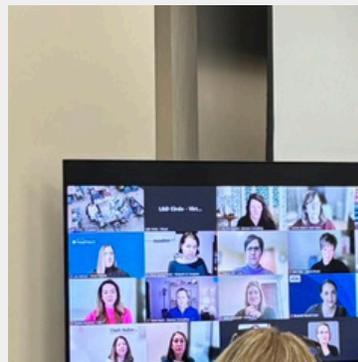
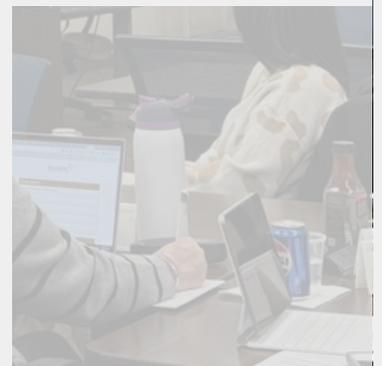
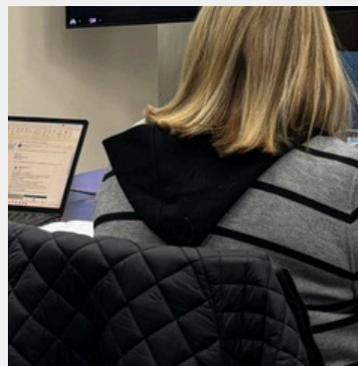


2026

Highlights from the

Boomer Learning & Development 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 Learning & Development Circle 2026 Spring Meeting

The Boomer Learning & Development Circle is a community of learning and development leaders from forward-thinking firms who are committed to aligning their firm's learning and training initiatives with firm strategy. Learn more at www.boomer.com.

In February of 2026, our Boomer Learning & Development Circle members met in Kansas City, Missouri, to share knowledge and build relationships with peers. The discussions centered around the following topics:

- **Trends for 2026: Shifts L&D Leaders Can't Ignore**
 - Firms face accelerating change in AI, operating models and profitability expectations, and L&D leaders must anticipate how these trends will reshape talent systems, leadership roles and development strategies.
 - During this session, we outlined five macro trends for 2026, including the rise of AI-first cultures, redesigned operating models built for scale, profitability as the primary execution metric and the need for fundamentally different talent systems. The discussion emphasized proactive alignment between firm strategy and L&D initiatives.
- **Turning Assessments into Actionable Development Tools**
 - As firms invest heavily in onboarding and continuous development, L&D leaders must ensure assessments aren't just data points. They can and should be strategic tools that improve readiness, performance and retention.
 - During this session, we explored how to integrate assessments thoughtfully into onboarding and development, distinguishing between assessment and evaluation, reviewing tools like tests, rubrics, practice activities and reflection exercises, and emphasizing awareness in design.
- **Onboarding Experienced Hires vs. Early Career Hires**
 - As firms compete for lateral talent and emerging professionals, a one-size-fits-all onboarding model risks slowing productivity, weakening engagement and missing critical integration gaps.
 - This facilitated discussion centered around differentiating onboarding by career stage, highlighting enhancements like pre-boarding surveys, role-specific training, intentional mentoring and more visible practice opportunities. Members explored how to use assessment data to identify skills gaps before day one, tailor development plans without rebuilding content from scratch and strengthen cultural integration for experienced hires who must adapt quickly to new systems, expectations and leadership dynamics.
- **Evolving the Buddy Model: Technical Mentors, Development Leads and Accountability**
 - As firms grow and talent models mature, informal "buddy" programs may fall short, leaving gaps in feedback, technical development and ownership of employee growth.
 - During a breakout session, one member firm discussed how they're shifting from loosely structured buddy programs to more intentional roles, such as technical mentors and development leads. Conversations centered on how to avoid role confusion among mentors, supervisors and peers, and how to equip those serving in these roles with the tools to drive measurable development outcomes.

- **L&D Circle Exchange**
 - Hearing real-world examples of what other firms are doing provides practical validation, helps accelerate implementation and reduces the risk of repeating avoidable mistakes for L&D leaders.
 - During our L&D exchange, firms shared projects or tools they've implemented, along with lessons learned and measurable outcomes. One project discussed during the exchange is a CPA study group cohort program to support and encourage team members in their journey through the CPA exam.
- **Sponsor Highlights**
 - L&D leaders must continuously evaluate emerging solutions that strengthen accountability and modernize professional education.
 - A representative from MyCPE1 shared insights on trends shaping continuing education and firm-wide learning strategies, emphasizing their platform's flexible delivery models, tracking capabilities and tools that improve engagement and accountability. The session encouraged members to think beyond compliance-based COE and consider how learning platforms can support strategic talent development while still improving the overall learner experience.
- **Recognition Systems: Driving Engagement without Creating Inequity**
 - As firms invest in peer-to-peer recognition platforms, L&D leaders must ensure these systems reinforce culture and engagement without unintentionally favoring highly visible roles over behind-the-scenes contributors.
 - Members shared experiences implementing platforms like AwardCo and WorkTango and explored how visibility bias impacts participation.
- **Integrating Remote and Senior-Level Experienced Hires**
 - Firms are hiring experienced managers in remote roles. But successfully integrating them into the firm takes more than technical onboarding. Without intentional connection points, senior hires can struggle to build internal relationships, gain visibility and secure meaningful work.
 - Members discussed challenges with experienced remote hires leaving due to a lack of integration and solutions like scheduling structured coffee chats, assigning departmental onboarding liaisons and giving new managers time in department meetings to showcase expertise.

Of course, it's impossible to cover everything we discussed at the Boomer Learning & Development Circle meeting in this short summary. However, the trends described in this report should give you some great insight into the L&D challenges and solutions that firms are thinking about today.

An Invitation to Participate in The Boomer Learning & Development Circle™

To learn more about the Boomer Learning & Development Circle community, please visit www.boomer.com/lcd.

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