

Highlights from the

Boomer Learning & Development Circle

Spring 2022

Topic Highlights from The Boomer Learning & Development Circle 2022 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 training initiatives with firm strategy. Learn more at www.boomer.com.

In April of 2022, 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:

- **Positive Focus**
 - We like to start every meeting by documenting the good things that we've done in our firms and sharing them with our peers.
 - Our members shared many good stories and wins they've had personally and professionally!
- **Future Vision Workgroups**
 - How can we move our firms forward to create sustainability in our future in L&D?
 - Members met in small workgroups to discuss who needs to be involved, what we're doing today, what is holding us back, and what actions we can take when we return home.
- **Speed of Trust**
 - The concepts, behaviors, and practical how-tos captured within the "Leading at the Speed of Trust" framework represent some of Franklin Covey's most intentional and impactful thought leadership.
 - Kevin Estep of Aprio spoke about demystifying trust in a way that sparks a desire to learn and modeling this vital leadership behavior.
- **MP Panel: L&D Alignment Is Imperative**
 - With a facilitated panel and open Q&A, we heard from managing partners at leading firms in the accounting profession.
 - Panelists discussed what they believe is important about L&D today in future-focused firms.
- **Show and Tell**
 - Five members were asked to bring a "show and tell" item – a resource they've developed or use internally to share with the group.
 - Resources shared include core skills training videos, an associate onboarding program and document management training.
- **Trends for 2022**
 - Each year, our consultants meet to discuss the major trends we see in the profession in the five areas crucial to a firm's success: leadership, growth, process, technology, and talent.

- In this session, we shared the top five trends in each area based on what we see while working with clients, attending accounting profession conferences and events, and having discussions with our Boomer Circle members.
- **L&D Budgets**
 - Learning and development are crucial to the growth of your people and the firm, but there's one catch: you need to budget for those expenses.
 - Our members discussed what they budget for L&D. Some numbers thrown around include \$2,000 to \$3,000 per employee or 1.3% of the firm's overall budget for all L&D.
- **Diversity, Equity, Inclusion & Belonging (DEI&B) Training**
 - DEI&B is a critical strategic initiative that is critical for your firm's success.
 - Members discussed how they're handling DEI&B training, including bringing in speakers from the AICPA, internal committees and webinars and contracting with external DEI consultants.
- **L&D: Virtual, Face-to-Face or Hybrid?**
 - The way we work has changed for good, and our L&D methods need to change with them.
 - Our members discussed how they're conducting learning and development programs today. Many are doing a mixture of virtual and face-to-face, depending on the topic, where people are located and the length of training needed.
- **Takeaways**
 - Personal planning time is essential for everyone, and our L&D group is no different. Members shared their takeaways from the meeting and the actions they plan on taking in the next six months.
 - Some of the takeaways our members shared include taking a new approach to associate onboarding, DEI initiatives and figuring out CPE processes.

Of course, it's impossible to cover everything that 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™

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