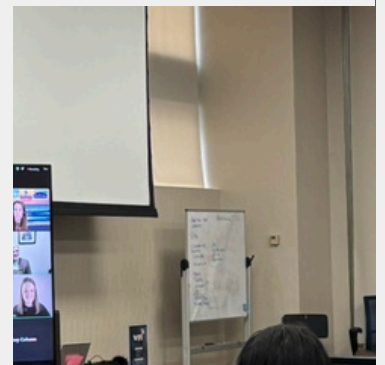
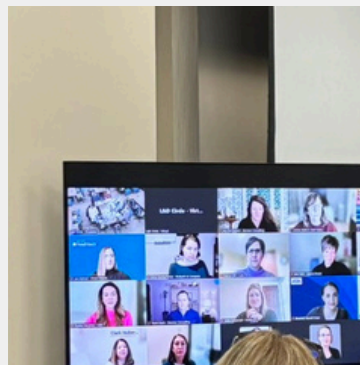
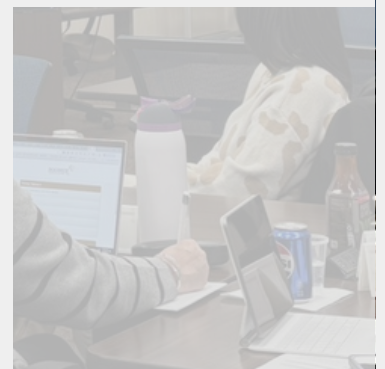
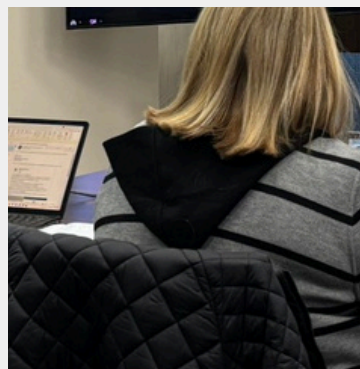


2026

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.



Highlights from the Boomer Learning & Development Circle™ 2026 Fall Meeting

The Boomer Learning & Development Circle™ is a community of learning and development leaders and professionals 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/ldc.

In September 2026, Circle members gathered virtually, to share knowledge and build relationships with peers. Discussions centered on the following topics.

- **Boomer Insights**

- Trends only help when they change decisions on your own team. AI, profitability pressures and evolving talent needs are reshaping firm priorities, so L&D leaders need to pick the one that deserves attention first.
- In this session, we revisited the five 2026 macro trends from the spring meeting. Members then voted on the trend with the biggest L&D impact and broke into small groups to discuss. Recurring themes included firms moving training from PowerPoint to interactive formats, younger team members wanting a clear roadmap of where the firm is headed, and AI forcing firms to rethink how they upskill people to review returns they never prepared.

- **Developing Technical Training Without Overloading Billable Staff**

- Every hour a technical expert spends building training is an hour they can't bill. L&D teams need a model that protects content accuracy and the expert's capacity.
- This session featured a show-and-tell with three firms. One member walked through a five-stage process where the expert contributes at three points: the request, a 30-minute discovery meeting and a 45-minute review. Another showed how a tax onboarding redesign uses Lectora videos uploaded to LCvista, a live practice return and a 30-minute daily recap. This freed the trainers for client work. The third presenter demoed Articulate Rise and its AI course builder. They build about 90% of their courses in Rise 360 and use Review 360 so reviewers can comment without email chains.

- **Circle Exchange**

- Lean L&D teams rarely have time to build from scratch. Seeing how peers approach similar projects can help L&D teams accelerate their own initiatives.
- One of our members shared a not-yet-final learning and development roadmap that puts mentor and development lead roles, the EAP and links to existing resources in one place for new hires and veterans. Another member created a custom GPT that checks training against NASBA standards. Another member firm turned a long process document into an agent that answers intern and team member questions.

- **Ask Your Peers: Training for Consulting and Advising**
 - Firms want team members to advise clients, but AI is automating the preparation work that used to build that judgment. L&D leaders are finding new ways to build judgment and advisory skills when traditional hands-on experience is changing.
 - One of our members shared that their firm's training is still a PDF of cross-sell tips, and they haven't found a way to level the skills by role. Another member shared how they give the whole firm a bite-sized Consultant Mindset segment at its twice-monthly lunch and learns. Another firm layers Master Class technical sessions, case-based training with partners twice a year, and a two-week Advisory Camp where top managers act as partners and lead client meetings.
- **Sponsor Highlights**
 - Firms need to keep up with new technology as automation and AI reshape the work. Vendors show how firms can proactively adopt solutions before pressure demands it.
 - Shawn Banfield of Zoho shared how Zoho's partner enablement work helps accounting firms move from fixer to advisor. He argued that vendors share the responsibility for helping firms manage software and support client needs. He closed by asking members where they need more from their vendors, and then opened the floor for questions.
- **Ask Your Peers: Changes that Made a Difference for L&D**
 - A small L&D team has to pick changes that pay off quickly. Learning what works at other firms helps L&D leaders prioritize practical improvements.
 - One of our members shared that her firm rolled out LCVista as its first LMS. They also use Synthesia, Claude, and ChatGPT to build facilitator guides that help technical experts apply adult learning principles. Another shared that she made individual learning plans part of the firm's balanced scorecard. Team members draft their plan, refine it with a supervisor, and finish with her. She said people now show up excited about their learning instead of scrambling for CPE credits at year-end.
- **Ask Your Peers: Pushback on AI in Training**
 - AI is at the center of many training strategies, so resistance from team members can stall adoption before it starts.
 - Several Circle participants reported limited resistance to AI in training. One firm scaled back AI avatars after team members called them creepy. Another found newer associates slow to explore AI beyond email edits and summaries, while an audit partner at her firm builds apps with vibe coding.

- **Employee Engagement, Learning Outcomes, and Moving Beyond Compliance**
 - CPE may bring people into the room, but workload and billable-hour pressure can tell them learning comes second. L&D leaders have to make the firm's actions match its message.
 - This session opened with the question "If CPE disappeared tomorrow, what would make people still want to learn?" We framed the conversation around three lenses: value, environment and reinforcement. Breakout groups identified what works, one major barrier and where learning gets lost. Members broke into small groups to discuss one practical step to involve partners.

It's impossible to cover everything we discussed at the Boomer Learning & Development Circle in this short summary. These highlights offer a look at the challenges L&D leaders are navigating and the practical ideas firms are sharing to strengthen learning and development.

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/ldc.

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