

Highlights from the

# Boomer Learning & Development Circle

---

## Topic Highlights from The Boomer Learning & Development Circle 2025 Fall 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](http://www.boomer.com).

In September of 2025, 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 Shaping Learning & Development**
  - Members considered how emerging business models, evolving workforce expectations and rapid technology shifts redefine what effective learning and development looks like in firms today.
  - The discussion emphasized aligning training and leadership programs with firm strategy. Developing skills for advisory, technology enablement and collaboration strengthen the growth pipeline and prepare the next generation of leaders.
- **Orientation and Onboarding**
  - Members discussed extending onboarding well past the first week and focusing on sustained integration, cultural connection and clarity of expectations to set employees up for long-term success.
  - The conversation explored strategies for engaging remote, hybrid and non-traditional hires, emphasizing the importance of tailoring onboarding experiences to different roles, backgrounds and learning styles.
- **Bridging the Generational Divide: Engaging Multi-Generational Learners**
  - In this session, members explored the unique values, motivations and communication preferences of Baby Boomers, Gen X, Millennials and Gen Z to create training that resonates across the workforce.
  - The discussion centered on practical ways to foster collaboration and knowledge transfer, including leveraging mentorship, technology and flexible delivery methods to bridge generational gaps and strengthen team cohesion.
- **Cultivating an Advisory Mindset**
  - Guest Angi San Souci of Rehmann joined our L&D Exchange to discuss how L&D teams can nurture critical thinking, curiosity and confidence to help professionals move from task execution to strategic client problem-solving.
  - The conversation focused on integrating business acumen, communication and relationship-building into training curricula to prepare team members for advisory roles that drive firm growth.

- **L&D Circle Exchange**
  - Members, including Deb Roth of AdamsBrown, shared recent L&D initiatives that enhance engagement, streamline learning delivery and align development programs with firm strategy.
  - Through open discussion, participants explore challenges and success factors from peer projects and walk away with new ideas to implement, adapt and innovate.
- **Sponsor Highlights**
  - One of our sponsors, UWorld, presented strategies for enhancing professional education and exam preparation through digital platforms designed to improve engagement, retention and accountability.
  - The session sparked discussion on how technology partners like UWorld can help firms strengthen learning pathways, streamline training delivery and support continuous development across all levels.
- **Reexamining Behaviors That No Longer Serve Firm Growth**
  - During a breakout discussion, members reflected on outdated systems, incentive structures and traditions that hinder progress.
  - The discussion encouraged L&D and HR leaders to ask deeper questions about why processes exist, explore their impact on culture and collaboration and model the curiosity needed to drive behavioral and organizational change.
- **Building Teams in a Global Workforce**
  - The group discussed how firms are expanding talent models across countries and cultures, and what it takes to help global teams integrate effectively within firm operations.
  - Participants emphasized the importance of appointing champions to lead communication, accountability and connection to ensure cross-border teams stay aligned and engaged.

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/ldc](http://www.boomer.com/ldc).

### **About Boomer Consulting, Inc.**

Boomer Consulting, Inc. provides consulting services to hundreds of the highest performing CPA firms. Our unique and powerful solutions target five areas critical to a firm's success: Leadership, Talent, Growth, Technology and Processes. For more information, visit [www.boomer.com](http://www.boomer.com).