

Highlights from the

# Boomer Learning & Development Circle

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

In February 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:

- **2025 Trends**
  - In this session, we examined the top trends shaping the accounting profession in the coming year.
  - Some trends discussed include implementing transformational frameworks and technology, modernizing the succession process, and empowering teams with AI skills.
- **DEI: What's the Next Move?**
  - As many corporations shift away from traditional DEI initiatives, this session explored how firms can adapt.
  - Bonnie Buol Ruszyzyk shared strategies and actionable steps to keep DEI at the forefront of firm culture and training efforts.
- **Boomer Updates & BKN Walkthrough**
  - In this session, we shared a few updates around Boomer Consulting, including the Circle communities we offer, our annual Boomer Circle Summit, and how we're expanding the metrics we track for members.
  - We also shared a demo of the Boomer Knowledge Network, a platform for delivering valuable resources, including on-demand training, strategic tools, videos, articles, white papers, and guides to empower our members and their firms.
- **L&D Circle Exchange**
  - Several member firms were asked to present a project they implemented in their firms to the group.
  - ClarkNuber, Lutz, and FreedMaxick shared projects or resources they're using and discussed best practices based on their implementation.
- **Generative AI in L&D**
  - Firms are leveraging tools like ChatGPT and CoPilot to streamline the design and development of training, proposals, and budgets.
  - During this session, Jennifer Palmeri of FreedMaxick and Shannon Wzientek and Julie Kirsch of Berkowitz Pollack Brant Advisors and CPAs presented a hands-on session to show members how to unlock the potential of generative AI in L&D.
- **Sponsor Highlights**

- Identifying new solutions and systems is a big part of the success of our firms.
- In this session, we heard from our sponsor, Galasso Learning Solutions. After a short presentation, we opened the floor to Q&A.
  
- **Take It Back Sharing**
  - Personal planning time is essential for everyone; 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.
  
- **Book Recommendations**
  - Sharing great resources we find is part of the value of a peer network.
  - Two of our members shared professional development books they've benefited from recently, including Give to Grow by Mo Bunnell and Your Invisible Network by Michael Melcher.

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

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

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