



2026 Initiatives and Goals

November 12, 2025

18 November 2025

Agenda

- Welcome and Introductions
 - Please display your name and firm name on Zoom
 - Raise your hand if this is your first LEA L&D Collaboration Group call!
- Top L&D Strategic Initiatives and Goals for 2026
 - Sharing initiatives taking place at Anders, Kerkering, Barberio & Co., KLR, Clark Nuber
 - Open discussion – we want to hear from you!
- LEA Updates

Anders

- 2026 Talent Theme -
 - *Retention with Intention: Investing in People, Inspiring Longevity*

Anders

- **Career Growth and Development Focus Area**

- *Foster employee success by providing coaching, continuous learning opportunities, and clearly defined career pathways that support skill building, professional growth, and long-term engagement.*

Initiatives:

- Implement Quantum Workforce Growth Module to bring together competencies, behavioral expectations, and performance, into one system.
- Increase transparency and understanding of career progression by clarifying the promotion process and internal mobility pathways.
- Develop and launch QAS Self-Study courses internally and externally
- Implement a skills inventory and process for validating employee skills

Anders

- **Leadership Development Focus Area**

- *Design and implement a comprehensive leadership development program that enhances skills in engagement, adaptability, and accountability, incorporating tailored training, mentorship opportunities, and measurable leadership KPIs. Achieve 90% participation among current and emerging leaders in leadership development training programs and improve manager effectiveness ratings by 2% in employee engagement surveys by the end of 2026.*

Initiatives:

- Expand and relaunch high potential leader development program for all interested Managers and Senior Managers
- Clarify Path to Partner process

Kerkering Barberio 2026 Initiatives

- **Staff Learning Plans**
- **Career Training Program**
 - KB Acceleration Academy
 - Cohort 1 – Year 2
 - Cohort 2 – year 1
 - Business Development L&L Series
 - Firm's Business Acumen L&L Series
- **Level Up Program(s)**
 - General Tax Updates
 - 1040 Intern Program

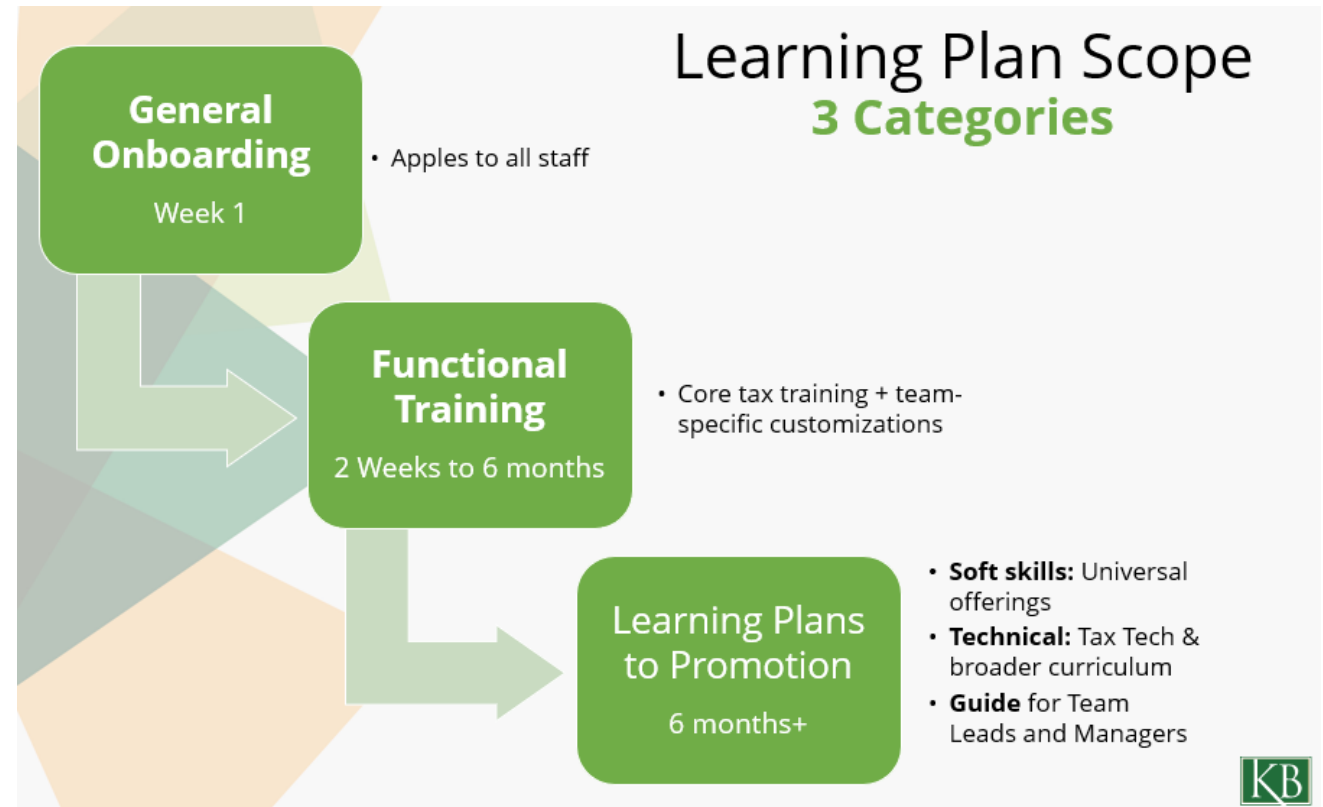
Are these tied to significant firm goals where L&D plays a key role?

- Yes, L&D creates, coordinates and implements based on established L&D goals.
- **L&D and Team Leaders established needs/wants and goals for L&D when first started.**
 - More Standardization and/or Processes; firmwide and within the team
 - Collaboration; share resources
 - Align tools to improve L&D
 - Provide Tools Needed
 - Positive Onboarding Experience
 - Career Development/Path
 - Accountability
- **The Firms Vision & Mission aligns with the L&D Mission.**

Staff Learning Plans

Goals of Updating Learning Plans:

- Elevate the new hire experience
- Right-size training to maximize efficiency
- Clarify development paths and expectations
- Empower staff with structure and oversight
- Enhance visibility into onboarding ROI
- Strengthen our internal talent pipeline
- Improve hiring precision and fit
- Attract top-tier candidates with a clear path to grow



Career Training Program

For Staff to In-Charge

“KB Acceleration Academy”

This Program is designed to **accelerate professional growth** by providing clear guidelines, expectations, and ongoing learning opportunities throughout the first three years of an employee's career.

Program Goals & Benefits:

- Deep Understanding of Responsibilities
- Enhanced Cross-Departmental Engagement
- Fostering a “One-Firm” Culture
- Preparation for Career Advancement

Topics Presented by Upper Levels:

- Differentiating Factors of our Firm
- Cross Team Departments/Collaboration
- Professional Etiquette Panel Discussion
- Business Acumen
- Appraisals, Bonuses, Career Path
- Career Expectations; Hours, Managing & Planning for the year, and receiving Feedback as Fuel
- Obtaining your CPA, EA, KB Offerings

Program Timeline

Cohort 1



Level Up Program(s)

What is the Level Up Program? What are we trying to accomplish?

❖ Onboarding Process to be Successful Faster:

Chunked Down Learning

Hands-on Training

Buddy support to **foster progress**

Practice through **repetition**

Making new staff and interns **billable faster**

Goal: To develop a training process and tools that foster a **positive** onboarding **experience**, resulting in happy, **high performing**, and **long-term employees**.

Bonus Outcomes:

- Buddies' confidence and knowledge improves.
- Ready made training materials.
 - Software's Manual
 - Level Up Guidebook

General Tax Level Up Program for Completing a Business Return:

2026 Continue to Evolve the program based on what we learned in 2025.

Level 1 – Initial Setup

Level 2 – Equity Tie-Out

Level 3 – Core Preparation “Meat of the Return”

Level 4 – FTJE’s & CCH Tax Software Porting

Level 5 – Tax Specific Workpaper & Finalization of Return

1040 Intern Program in 2026

- Adopting the Chunked down level up approach to completing 1040’s.
- Creating ready made content for future years.

KLR Initiatives

- Continue with Suffolk Leadership program
- Review and update role expectations to find common bullets across departments
- Develop plan for spot bonus and annual bonus program – thinking will relate to firm strategic goals and/or values
- Build new training courses including Running and Efficient meeting, Networking 101; Conducting Effective Interviews; Excellent Client Service; Brand Yourself; Train the Trainer
- Expand Leadership Development Program

Clark Nuber's 2026 L&D Projects

- Develop learning paths around our core competencies for all staff.
- Implement Conferences i/o
- Continue to increase our offerings for our non-technical staff. Will be rolling out LinkedIn Learning for operations staff. Need to develop learning paths –such a large amount of content.
- Relaunching our Leadership Development Institute after a two year break. Refreshed content.
- Educate and enforce NASBA Registry requirements with SMEs and trainers.



What are key L&D initiatives
planned for 2026 at your
firms?

LEA Updates



Thank you!

Looking forward to hearing more about these initiatives during Collaboration Group calls in 2026!

