CUSTOMER STORY

How HoganTaylor stopped saving CPE for December

INDUSTRY	SIZE	LOCATION	LUMIQ SINCE
Public Accounting	400+ employees	Oklahoma & Arkansas	Fall 2022

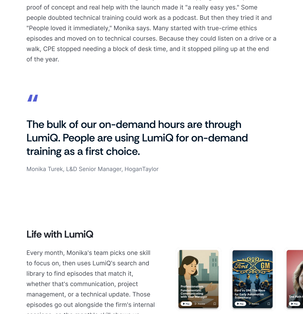
HoganTaylor, a top 100 U.S. public accounting firm, more than doubled the LumiQ CPE credits its people earned in 2026 while moving from a year-end CPE scramble to year-round learning.

The challenge: last-minute CPE

For a long time, December was CPE month at HoganTaylor. Nobody planned it that way. It's just when people finally got to it. Since bringing in LumiQ in fall 2022, the firm has turned that habit around, building podcast-style learning into everything from monthly skill campaigns to role-based learning paths.

Before 2020, learning at HoganTaylor happened at in-house sessions or conferences. When the pandemic hit, the firm bought an unlimited on-demand subscription from another provider as a stopgap. People liked the flexibility, but CPE was still a box to tick, often crammed into the last two weeks of December, "if not the last three days," recalls Monika Turek, L&D Senior Manager.

When Monika started building HoganTaylor University (HTU), the firm's in-house learning and development program, in late 2021, she wanted something that kept people learning all year and tied that learning to their careers.



Why HoganTaylor chose LumiQ

The unlimited subscription gave people access, but access alone didn't change HoganTaylor's team's listening habits. CPE still got saved for December. This is where LumiQ came in to help give the team flexibility to listen whenever and wherever they wanted.

When LumiQ reached out in 2022, HoganTaylor wasn't shopping for a new provider. A proof of concept and real help with the launch made it "a really easy yes." Some people doubted technical training could work as a podcast. But then they tried it and "People loved it immediately," Monika says. Many started with true-crime ethics episodes and moved on to technical courses. Because they could listen on a drive or a walk, CPE stopped needing a block of desk time, and it stopped piling up at the end of the year.

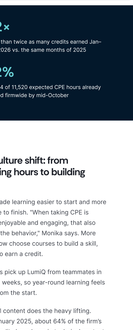
> **The bulk of our on-demand hours are through LumiQ. People are using LumiQ for on-demand training as a first choice.**
>
> Monika Turek, L&D Senior Manager, HoganTaylor

Life with LumiQ

Every month, Monika's team picks one skill to focus on, then uses LumiQ's search and library to find episodes that match it, whether that's communication, project management, or a technical update. Those episodes go out alongside the firm's internal sessions, so the month's skill shows up wherever people are learning.

LumiQ Learning Paths give staff a clear plan, such as structured Yellow Book training, and the tax group is now building paths for each level. Ready-made discussion guides round it out. "That saves us tons of time," Monika says.

People listen wherever it works for them: at their desks, at the gym, or on walks. Todd Wisdom, Specialty Services Area Leader, Growth Leader and Assurance Partner, was skeptical at first. Now he listens consistently on his drive between offices.



> **LumiQ provides me the opportunity to use that windshield time to remain current on technical topics as well as embolden my strategy, operations, and leadership skillset.**
>
> Todd Wisdom, HoganTaylor

THE IMPACT

Results that prove year-round learning works

1,633
LumiQ CPE credits earned in 2026 (through October 6)

>2×
More than twice as many credits earned Jan–Sep 2026 vs. the same months of 2025

~50%
Of external CPE courses used in 2026 came from LumiQ (HoganTaylor's records)

92%
10,634 of 11,520 expected CPE hours already logged firmwide by mid-October

The culture shift: from counting hours to building skills

LumiQ made learning easier to start and more enjoyable to finish. "When taking CPE is actually enjoyable and engaging, that also changes the behavior," Monika says. More people now choose courses to build a skill, not just to earn a credit.

New hires pick up LumiQ from teammates in their first weeks, so year-round learning feels normal from the start.

Technical content does the heavy lifting. Since January 2025, about 64% of the firm's LumiQ credits have been in technical content such as auditing, tax, and accounting, with Single Audit and Yellow Book near the top. And when someone needs something specific, the same library makes it easy to find relevant episodes in minutes, from ethics and estate tax to cybersecurity and AI. They pick one and listen on their own time.

> **LumiQ allows me to… obtain quality CPE throughout the year, rather than experiencing the anxiety which comes with attempting to obtain 40 hours of CPE the last two weeks in December.**
>
> Todd Wisdom, Specialty Services Area Leader, Growth Leader and Assurance Partner, HoganTaylor

Looking ahead

Next, HoganTaylor is bringing LumiQ into team development. Monika is putting together a list of pre-approved topics, each with a LumiQ episode as pre-work and a discussion guide. The firm will set up the discussions to earn CPE internally, so team leaders can pick a topic and run a session with very little prep.

About HoganTaylor

HoganTaylor is one of the largest business advisory and public accounting firms in Oklahoma and Arkansas, with a growing presence in Louisiana, and a top 100 firm in the U.S. With more than 400 employees, the Firm provides tax, assurance, risk, business advisory, accounting, technology, and many specialty and industry-focused services. HoganTaylor is an independent member of PrimeGlobal, one of the five largest associations of independent accounting firms in the world. Learn more at hogantaylor.com.

About LumiQ

LumiQ is an audio-first CPD/CPE platform for finance and accounting teams that turns required learning into strategic upskilling. Our podcasts are developed to be enjoyed and retained, so your team's learning leads to career growth and business results. LumiQ is a NASBA-approved provider of CPE.

See how LumiQ can support your firm

Give your people professional education they'll use, remember, and recommend to one another.

Book a LumiQ demo