

# MARCH 2025 BLOG

WMH Advisors



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## Learn, Earn, Return

Learn, Earn, Return is a philosophy to promote professional development, successful achievement of goals and giving back to society. As a board director, consider this framework as you strategize and define goals and priorities for 2025.

1. **Learn:** Place an emphasis on certifications, competency building, and knowledge of emerging business trends to lay the foundation for enhancing education and credentials. To shape your selections, consider *Forbes Top 10 Governance and Leadership Trends for 2025* to stay abreast of relevant board agenda topics. One example is **Board Oversight of Artificial Intelligence (AI)**. Artificial Intelligence is a set of technologies that enable computers to perform a variety of advanced functions, including the ability to see, understand and translate spoken and written language, analyze data, make recommendations, and more.<sup>2</sup> Board oversight of AI is centered on governance and the AI technologies impact on operations, decision-making, and long-term strategy. The following is a representative versus all-inclusive list of examples.

| Components of Oversight | Process Diligence   |
|-------------------------|---|
| Strategic Alignment     | Assess the alignment with strategic goals, mission and values                               |
| Risk Management         | Implement guardrails and policies to prevent AI from perpetuating bias and risks            |
| Compliance and Legal    | Validate compliance with regulations such as data privacy, ethics and intellectual property |
| Talent and Expertise    | Offer fit for purpose training for board members and management                             |
| Performance             | Evaluate mechanisms to validate that AI intended outcomes are on track                      |
| Stakeholder Engagement  | Assess perspectives of stakeholders to build trust and transparency                         |

When considering AI tools for corporate boards, the emphasis should be on solutions that enhance decision-making, oversight, and operational efficiency. Examples include:

|                           |  |
|---------------------------|--|
| Tableau with AI features  | Visualizes complex data and identifies key patterns                                |
| Microsoft Power BI        | Integrates AI for predictive analytics and interactive dashboards                  |
| Workday Adaptive Planning | Uses AI for scenario modeling and budgeting  |
| Board Intelligence        | Provides AI for drafting concise board discussion papers and summarizing decisions |

2. As a board director, consider resources such as
  - The Board Member's Guide to Overseeing AI that offers baseline insights on how boards can get started with AI to include strategy, accountability, risks, governance, and regulations.
  - Association membership in organizations such as the National Association of Corporate Directors, Private Directors Association and Board Prospects.

**Earn:** The process of how one applies their learning to generate income and achieve financial stability. Wealth accumulation over a period of time is one result. Once you have evolved your skills and knowledge the focus shifts to applying them to create value, achieve impact, enhance career choices and achieve business success. Think about ways to parlay what you have learned and transfer the business acumen to develop others. Curate the experiences into use cases and learning artifacts.

3. **Return:** Now is the time to give back and channel your resources via philanthropic commitments, mentoring, volunteering or investing in the next generation. Partner with academic institutions or community centers to offer workshops on AI basic competencies with engaging exercises. Participate in a career expo and share an overview of career paths such as a data scientist or AI engineer. This expression reflects a sense of gratitude and responsibility to empowering communities and building a legacy. Expand your philanthropic impact by committing to a multi-year pledge donation.
4. The **Learn, Earn, Return** practice promotes parity and is a reminder that an experience such as board service is not just about professional gain but also about creating a meaningful impact for organizations and a community of stakeholders as a way to pay it forward.



## References

1. [Forbes – Top 10 Governance and Leadership Trends for 2025 - By Michael Peregrine](#)
2. [What is artificial intelligence \(AI\) ?](#)
3. [The Board Member's Guide to Overseeing AI](#)