



## **2026 Business Insights:** Navigate Change and Drive Growth

**JANUARY 27, 2026**

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# Overview

- **Founded in 1938**

- **550+ Employees**

- **Top 60 Firm**

- **\$100+ Million Revenue**

- **National & Global Reach**

- **10 Offices Across Ohio, Kentucky, Michigan & India**  
with remote employees across the U.S.



Clark Schaefer Hackett, along with our brand extensions, is committed to empowering businesses to succeed through **strategic guidance, tailored solutions, and industry expertise.**

We're striving to be your most valued advisor. We accomplish this through becoming an extension of your team in areas such as **financial, technological, operational, and human resources.**

## Moderator

## Panelists



**Phil Hurak**  
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**Carly Devlin**  
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**Glenn Plunkett**  
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**Kourtney Nett**  
*Managing Director*  
**Risk & Controls**  
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# | Cybersecurity

## Focus Areas

- ✓ AI & Emerging Technologies Risk Management
- ✓ Cybersecurity Regulatory Landscape & Compliance
- ✓ Ransomware & Third-Party Risk Evolution



Looking to better manage cybersecurity risk?

Contact Carly Devlin, Shareholder & CISO

[Cdevlin@clarkschaefer.com](mailto:Cdevlin@clarkschaefer.com)



# | Human Resources

## Focus Areas

- ✓ Managing Workplace Conflict in Diverse, Multigenerational Teams
- ✓ Enhancing Employee Experience Amid Hybrid Work, AI, and Cost Constraints
- ✓ Strategic Workforce Planning & Skills-Based Talent Management



Looking to strengthen your workforce strategy?

Contact Alisa Fedders, Director of HR Services

[Alisa@strategichrinc.com](mailto:Alisa@strategichrinc.com)

# | Operations

## Focus Areas

- ✓ Market Uncertainty Driving Staff and Resource Decisions
- ✓ Global Supply Chains Reacting to Geo-Political Risk and Uncertainty
- ✓ Align the right people, process, and tools to solve YOUR problem



Exploring opportunities to better align your workforce, processes, & data?

Contact Joe Brown, Managing Director of Operational Excellence

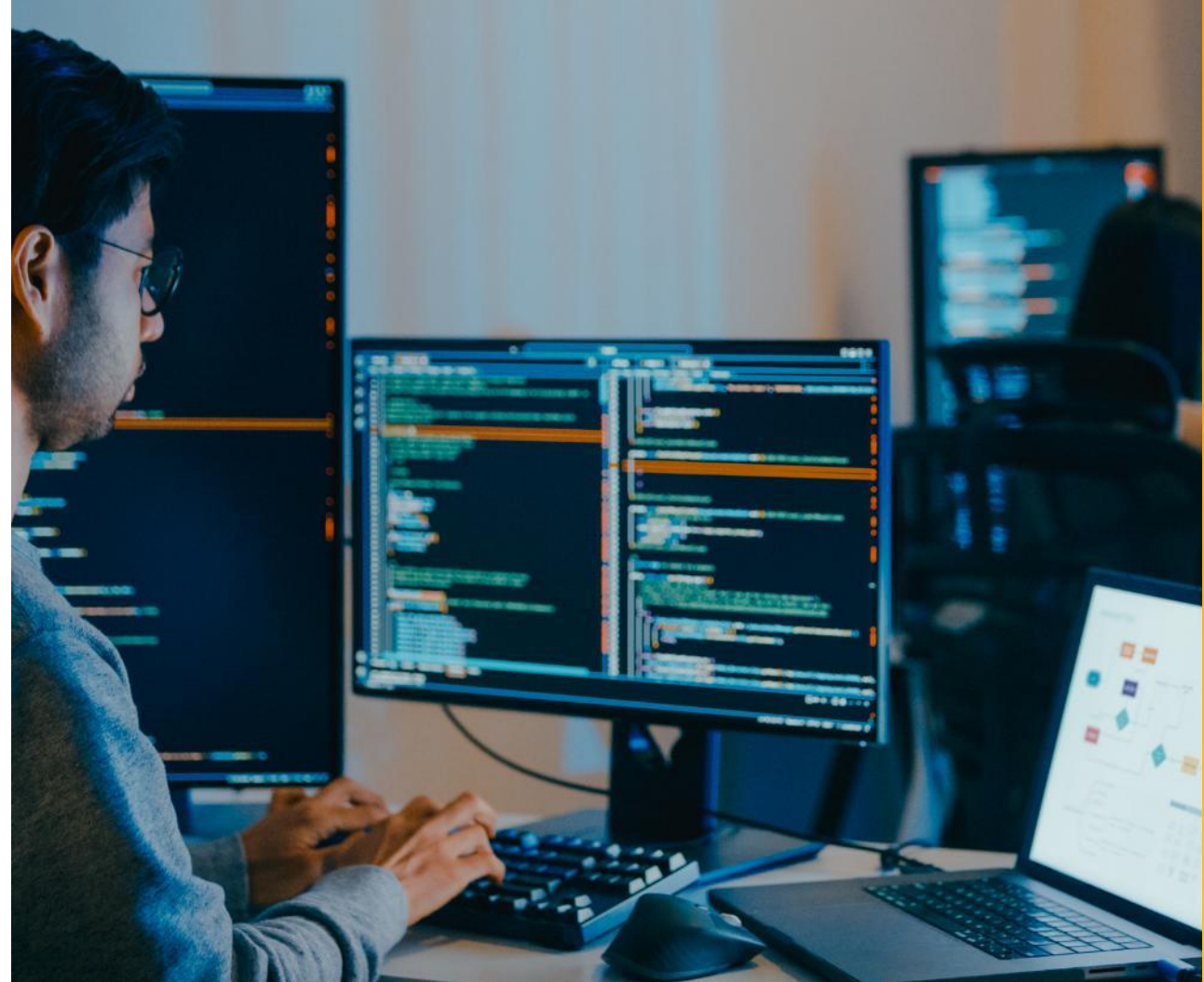
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# | Technology

## Focus Areas

- ✓ Artificial Intelligence in FP&A
- ✓ Enterprise Automation
- ✓ Data Analytics & Insight



Exploring ways to align your technology strategy with your goals?

Contact Glenn Plunkett, Director of Technology Activation

[GAPlunkett@clarkschaefer.com](mailto:GAPlunkett@clarkschaefer.com)



# | Risk & Controls

## Focus Areas

- ✓ ERM – Orchestrating Risk Intelligence
- ✓ Internal Audit 2.0 – The Strategic Advisor
- ✓ Navigate Change More Effectively with a Unified Governance Model



Looking to better understand your internal controls and risk profile?

Contact Kourtney Nett, Managing Director of Risk & Controls

[KKNett@clarkschaefer.com](mailto:KKNett@clarkschaefer.com)



# Thank You!

**More questions?**

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We offer all the sophisticated services you expect from a top CPA and advisory firm – but it's our service style that sets us apart.

## | CSH Capabilities

### Solutions

- Audit & Assurance
- Cost Accounting
- Cost Segregation
- Employee Benefit Plan Audit
- Fraud and Forensic Accounting
- Lease Accounting
- Mergers & Acquisitions/Transaction Advisory
- Outsourced Accounting Services
- Private Client Services
- Qualified Plan Administration & Consulting
- Risk Management
- State and Local Tax
- Sales Tax Outsourcing
- Tax Compliance
- Tax Consulting
- Tax Controversy
- Tax Credits and Incentives



Lasting growth starts with the details. With 20+ years of experience, we deliver practical solutions that help businesses thrive today and plan for tomorrow.

## | CSC Capabilities

### Operational Excellence

- Business Process Optimization
- Lean Six Sigma
- Project Management
- Change Agency

### Risk & Controls

- Internal Audit
- Risk Management
- SOC Reporting
- Planning & Governance
- Regulatory Compliance

### IT Risk & Cybersecurity

- Security Assessment & Testing
- Security & Privacy Compliance
- IT & Security Policies and Procedures
- Response & Recovery Planning and Testing
- Third Party Technology Risk Management
- IT Audit & Risk Assessment

### Technology Activation

- Digital Transformation & Digital Velocity
- Automation – Operational Technology
- Business Intelligence
- Cloud Infrastructure
- Application Development





## Recordkeeping & Compliance

- Affirmative Action Plans
- Compliance Reporting (ACA, EEO, etc.)
- Employee File Audit
- FMLA Management
- HRIS Implementation and Optimization
- I-9 Audit
- Payroll Processing and Management

## Health, Safety & Security

- Active Shooter Training
- Emergency/Contingency Planning
- Safety Manuals
- Wellness Programs
- Workers' Compensation

# CSSHR Capabilities

## Benefits & Compensation

- Benefits Analysis
- Job Benchmarking
- Job Descriptions
- Pay Structure Design and Equity
- Total Compensation Statements Analysis

## Communications

- Employee Surveys
- Focus Groups
- Handbooks
- Newsletters
- Policy Development

## Employee Relations

- Conflict Resolution
- Corrective Action/Grievances
- 360 Surveys/Performance Management
- Performance Management
- Workplace Investigations

## Recruitment

- Assessments
- Contract/Fractional Staffing Support
- Employment Branding
- Full Cycle Recruiting
- Recruiting Analysis
- Reference Checks

## Training & Development

- Assessment Workshops (DiSC, 5 Behaviors, MBTI)
- Customized Training Programs
- Employee and Management Coaching
- Leadership & Supervisor Development
- Team Building & Workforce Engagement

## HR Strategy

- HR Audit Organizational Analysis
- HR Department Startup
- Mergers & Acquisitions
- Succession Planning