



## Agenda

HR Leaders Fly-In – October 7-9, 2026

Host Firm: Meredith Cornish, KLR, Boston MA

| Wed., Oct. 7            | Topic                                                                                                                                                                                   | Facilitator(s)/Presenter                                 |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| 1:00 – 5:00 pm          | <b>HR Steering Committee – Strategic Working Session</b><br>(a calendar invite will be sent for the venue)                                                                              | Cheryl Glover (Chair)<br>and Jennifer Sides (Vice Chair) |
| 7:00 pm                 | HR LEADERS GROUP DINNER FOR THOSE<br>ARRIVING IN TIME<br>(a calendar invite will be sent for the venue)                                                                                 |                                                          |
| <b>Thursday, Oct. 8</b> |                                                                                                                                                                                         |                                                          |
| 8:15 am                 | BREAKFAST ON-SITE                                                                                                                                                                       |                                                          |
| 9:00 – 9:30             | <b>Welcome and Introductions</b><br><u>Handout/Pre-Survey</u> : Recap by Firm: HR<br>Department Composition and Firm Demographics                                                       | Cheryl Glover                                            |
| 9:30 – 10:00            | <b>Leadership's Partnership with HR and Impact to the Employee Experience</b>                                                                                                           | Paul Oliveira, CPA, MST<br>CEO at KLR                    |
| 10:00 – 11:00           | <b>Evolving Role of HR as a Strategic Advisor Rather than Operational Function</b><br>Balancing compliance, culture and growth at mid-sized firms                                       | Meredith Cornish                                         |
| 11:00 – 11:15           | BREAK                                                                                                                                                                                   |                                                          |
| 11:15 – 12:00           | <b>The 5 Dysfunctions of a Team &amp; Impact on Accountability &amp; Results</b><br>Executive Coach to provide valuable insights for partners, senior leaders and HR leaders            | Marc Cote, Focal Point                                   |
| 12:00 – 1:00 pm         | LUNCH ON-SITE                                                                                                                                                                           |                                                          |
| 1:00 – 2:00             | <b>Total Rewards and Compensation Strategy</b><br>Has your total rewards strategy changed? If so, how? We hope you will leave with 2–3 compensation strategy benchmarks from peer firms | Sarah Petrone                                            |
| 2:00 – 3:00             | <b>Automations and AI</b><br>What processes have been successful? How do you see AI changing the organizational structure of your HR department or overall firm structure?              | Kiran Sanghera                                           |
| 3:00 – 3:15             | BREAK                                                                                                                                                                                   |                                                          |

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| 3:15 – 4:45                                                                                                                                                                                                                                                                  | <b>Show and Share</b><br>Share a key project or initiative that delivered value to the employee population and positioned HR as a strategic business partner | Cheryl Glover                                           |
| 4:45 – 5:00                                                                                                                                                                                                                                                                  | <b>Q&amp;A and Wrap-Up</b><br>Wrap-up and answer questions                                                                                                   | Cheryl Glover                                           |
| 6:30 pm                                                                                                                                                                                                                                                                      | DINNER OFF-SITE<br>(a calendar invite will be sent for the venue)                                                                                            |                                                         |
| <b>Friday, Oct. 9</b>                                                                                                                                                                                                                                                        |                                                                                                                                                              |                                                         |
| 7:30 am                                                                                                                                                                                                                                                                      | BREAKFAST ON-SITE                                                                                                                                            |                                                         |
| 8:00 – 9:00                                                                                                                                                                                                                                                                  | <b>Partner Lifecycle</b><br>How to support new partners through orientation, compensation transparency and development                                       | Jennifer Sides                                          |
| 9:00 – 10:00                                                                                                                                                                                                                                                                 | <b>Talent Integration</b><br>Effectively onboarding and integrating new hires into firm culture and operations                                               | Kiran Sanghera                                          |
| 10:00 – 10:15                                                                                                                                                                                                                                                                | BREAK                                                                                                                                                        |                                                         |
| 10:15 – 11:15                                                                                                                                                                                                                                                                | <b>Year-End Labor &amp; Employment Legal Update</b><br>Compliance and Legal Hot Topics                                                                       | Julianna Malogolowkin<br>and John Wilusz, Hickley Allen |
| 11:15 – 12:15                                                                                                                                                                                                                                                                | <b>Wrap Up and Parking Lot Items</b>                                                                                                                         |                                                         |
| 12:15 pm                                                                                                                                                                                                                                                                     | BOXED LUNCH TO GO                                                                                                                                            |                                                         |
| <b>Parking Lot Topics</b> <i>(add topics to this list throughout the meeting – topics can be considered for future meetings if all topics are not discussed during the Fly-In)</i><br>Potential topics include workforce planning, retention strategies, HR tech stack, etc. |                                                                                                                                                              |                                                         |
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#### Steering Committee Members

Cheryl Glover, Draffin Tucker (Chair)  
Jennifer Sides, Anders (Vice Chair)  
Molly Willinger, BeachFleischman  
Kiran Sanghera, Miller Kaplan  
Sarah Petrone, Clark Nuber  
Meredith Cornish, KLR