
rkl
WEBINAR SERIES
WHAT'S NEXT
Trusted guidance and context for a fast-changing 2026

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Welcome and Meet Your Moderator

Eric Wenger, CPA, MST

Managing Partner, Lancaster Office

Business owners and families work with Eric when they are facing important decisions around growth, ownership transitions and long-term tax strategy. With more than 25 years of experience, Eric advises closely held and family-owned businesses across the manufacturing, distribution, real estate and service industries. He is known for his thoughtful, relationship-driven approach, often working with multiple generations of owners to help families navigate complex tax and business matters and make informed decisions during pivotal moments.

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Welcome and Meet Your Speakers

Gretchen Naso, CVA, MBA

President,
Virtual Management Solutions

Three decades of consulting experience evaluating organizational structures, staffing, and processes to enhance efficiency and deliver greater value.

President of RKL Virtual Management Solutions, overseeing operations and expanding outsourced capabilities that support next-level organizational growth.

Relationship-driven, consultative leader focused on aligning solutions with each client's unique goals across industries, including franchising, real estate, and nonprofits.

Walt Goodfield

Partner, Chief Business Officer,
RKL eSolutions

Nearly 30 years of experience helping manufacturing and distribution organizations solve complex challenges through automation, optimization, and process best practices.

ERP software leader with experience selling, implementing, and supporting solutions for mid-market enterprises, including leadership roles at three major software publishers.

Leads customer success and growth at RKL, driving new customer acquisition and managing strategic partner alliances.

Michael McAllister, CPA.CITP, CISA

Partner,
Is Assurance & Advisory Services

Partner and Leader of RKL's IS Assurance and Advisory Services Practice, helping clients address complex information technology, security, and financial audit risks.

More than 28 years of accounting and computer science experience, bridging financial processes with the technology systems and controls that support them.

Deep expertise in IT audits, governance, QA/IV&V, and SOC services, including SOC 1 and SOC 2 readiness assessments and gap analyses across diverse industries.

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Decision Gate 1

What problem are we trying to solve?

Actionable Takeaway

Create a problem statement

- *We want to improve **[process or decision]** for **[users]** because the current approach causes **[specific issue]**. We will know the initiative is successful if **[measurable result]** improves.*

Decision Gate 2

Are we ready?

Actionable Takeaway

Use a readiness scorecard

Rate each use case as green, yellow, or red:

- **Business case:** Clear, valuable, and owned?
- **Process:** Documented and consistent?
- **Data:** Accurate, accessible, classified, and fit for use?
- **Technology:** Secure, reliable, and capable?
- **Security:** Privacy, vendor, access, and cyber risks understood?
- **Controls:** Outputs reviewable, monitored, and overridable?
- **Workforce:** Users trained and prepared?
- **Governance:** Accountability and escalation defined?

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Decision Gate 3

What type of solution fits the need?

Actionable Takeaway

Choose the minimum necessary capability

Before selecting a solution, ask:

- Could reporting, workflow improvements, or automation solve the problem?
- Should AI generate, recommend, or act?
- What data access is required?
- Must AI connect to core systems?
- Can qualified employees review its output?
- Do the benefits justify the complexity and risk?

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Decision Gate 4

Can we trust and control it?

Actionable Takeaway

Assign a risk tier before proceeding

Evaluate each use case based on:

- Data sensitivity and applicable obligations
- Consequences of incorrect output
- System access and level of autonomy
- Ability to detect errors
- Availability of qualified human review
- Financial, operational, and reputational impact

Decision Gate 5

Is the full investment worth it?

Actionable Takeaway

Establish a baseline and target

Before launching a pilot, define:

- Current process time and cost
- Current error, rework, or exception rate
- Expected improvement
- Expected implementation cost
- Expected ongoing cost
- Required level of user adoption
- Key control or risk measures
- A date when leadership will evaluate results

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Decision Gate 6

Pilot, scale, revise, or stop?

Actionable Takeaway

Use a formal pilot decision process

At the pilot's conclusion, choose one path:

- **Scale:** Benefits are proven, risks are controlled, and the organization is ready.
- **Revise:** The opportunity remains, but readiness or controls need improvement.
- **Stop:** Value is insufficient, risk or adoption is unacceptable, or a simpler solution exists.

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90-Day Plan

Days 1-30: Discover and Prioritize

- Inventory current AI tools, employee uses, vendors, and data exposure.
- Establish interim guidance for the use of public AI tools.
- Name an executive sponsor and cross-functional working group.
- Identify three potential business use cases.
- Review AI functionality already available in existing financial and operational systems.

Days 31-60: Assess and Design

1. Select one manageable, meaningful use case.
2. Complete business, process, data, technology, workforce, and risk assessments.
3. Establish a performance baseline and targeted benefits.
4. Evaluate the solution provider and data-security approach.
5. Define ownership, permitted use, human review, and control requirements.

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Days 61-90: Pilot and Learn

- Train a limited group of users.
- Conduct a controlled pilot.
- Measure benefits, errors, exceptions, adoption, and total cost.
- Gather feedback from users and process owners.
- Make a documented decision to scale, revise, or stop.

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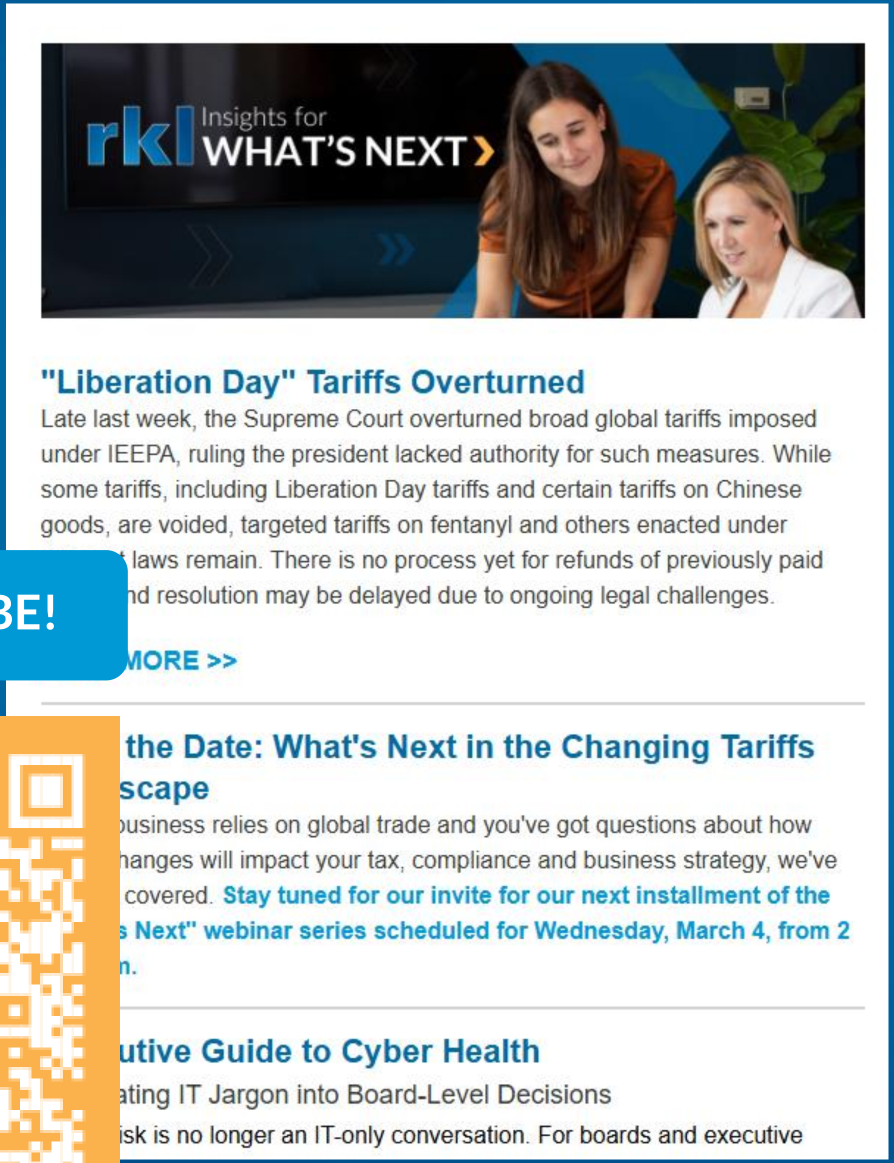

"Liberation Day" Tariffs Overturned

Late last week, the Supreme Court overturned broad global tariffs imposed under IEEPA, ruling the president lacked authority for such measures. While some tariffs, including Liberation Day tariffs and certain tariffs on Chinese goods, are voided, targeted tariffs on fentanyl and others enacted under
t laws remain. There is no process yet for refunds of previously paid
nd resolution may be delayed due to ongoing legal challenges.

MORE >>

**the Date: What's Next in the Changing Tariffs
scape**

business relies on global trade and you've got questions about how
hanges will impact your tax, compliance and business strategy, we've
covered. **Stay tuned for our invite for our next installment of the
s Next" webinar series scheduled for Wednesday, March 4, from 2
n.**

utive Guide to Cyber Health

ating IT Jargon into Board-Level Decisions

isk is no longer an IT-only conversation. For boards and executive

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Questions?

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