

The logo for the AED Summit. It features the letters 'AED' in a bold, dark blue font. The letter 'A' is stylized with a green triangle inside its upper left portion. To the right of 'AED' is a registered trademark symbol (®). Below 'AED' is the word 'SUMMIT' in a dark blue, all-caps, sans-serif font, with wide letter spacing.

AED[®] SUMMIT

A background image of a city skyline at dusk or dawn. The sky is a mix of blue and orange. In the foreground, there is a body of water with a fountain in the center. The buildings are lit up, and their reflections are visible in the water.

**ADVANCING THE EQUIPMENT DISTRIBUTION
INDUSTRY THROUGH NETWORKING,
EDUCATION AND LEADERSHIP**

2025 AED SUMMIT
HYATT REGENCY ORLANDO • JANUARY 15–17, 2025



JOHN SHEARER

2024 AED CHAIRMAN OF THE BOARD
CEO, 4 RIVERS EQUIPMENT

DEAR AED MEMBER:

The 2025 AED Summit is fast approaching, and it's going to be a can't-miss event! I hope this letter finds you well and full of energy as we prepare for another year of growth and collaboration. I'm excited to invite you to the 2025 AED Summit, set for January 15-17 in Orlando, Florida.

The AED Summit is a one-of-a-kind opportunity for our community to unite, exchange ideas, and share knowledge that will drive our collective success. It's a time to build new relationships, strengthen existing ones, and create partnerships that will advance the future of equipment distribution.

This year's Summit is shaping up to be an extraordinary event. We have an outstanding lineup of keynote speakers, industry experts, and thought leaders ready to share insights on the latest trends,

innovations, and strategies that are transforming our industry. The sessions will cover a wide array of topics, from technology and business strategies to advocacy, workforce development, and leadership.

HERE ARE SOME OF THE EXCITING HIGHLIGHTS YOU CAN EXPECT AT THE 2025 AED SUMMIT:

- **Fundraising Gala & Live Auction:** Join us for an unforgettable "Havana Nights" themed evening in support of the AED Foundation! All proceeds from this event will fund initiatives that promote long-term career pathways, workforce development, and continued education to enhance the success of AED member companies.
- **Keynote Presentations:** Be inspired by visionary leaders who will share their wisdom and experiences, offering valuable insights into the future direction of our industry.
- **Educational Workshops:** Participate in hands-on sessions led by experts, offering practical strategies to optimize your business and drive growth.
- **Networking Opportunities:** Connect with fellow AED members, manufacturers, suppliers, and service providers to forge new connections and strengthen current relationships.
- **Conference Dealer Expo and Suites:** Discover the latest equipment, technologies, and services showcased by industry partners, ensuring you stay ahead of the curve.

As Chairman of the Board, I urge you to take advantage of this incredible opportunity to attend the 2025 AED Summit. Your participation will not only fuel your personal and professional growth but also help shape the future of our entire industry.

Registration is now open, so don't wait to secure your spot! Visit www.aedsummit.com for detailed information on registration, the agenda, and accommodation options.

Thank you for your unwavering commitment to Associated Equipment Distributors. I can't wait to personally welcome you to the 2025 AED Summit and share in the excitement of the experience.

Visit www.aedsummit.com for updated information



TUESDAY, JANUARY 14

1PM – 5PM ————— Registration

WEDNESDAY, JANUARY 15

7:30AM – 5PM ————— Registration

8AM – 5PM ————— Hospitality/Meeting Room Suites

10:30AM – 12PM ————— Far West Regional Meeting

12:30PM – 1:15PM ————— Annual Meeting of the Membership (members only)

1:30PM – 2:30PM ————— General Session

2:45PM – 5PM ————— Professional Education Sessions

5PM – 6:30PM ————— Extended Registration for AED Foundation Gala Ticket Pick Up

5:30PM – 6:30PM ————— 1st Time Attendee/New Member Reception, sponsored by
Federated Insurance (by invitation only)

5:30PM – 6:30PM ————— Women In Equipment Reception, sponsored by Forvis Mazars

6:30PM – 9:30PM ————— The AED Foundation's Annual Fundraising Gala & Live Auction
presented by Ritchie Bros.

9:30PM – 11:30PM ————— After Hours Welcome Reception sponsored by LiuGong

THURSDAY, JANUARY 16

7:30AM – 3PM ————— Registration

8AM – 9AM ————— Manufacturer Member Breakfast Meeting (by invitation only)

8:30AM – 9:15AM ————— Summit Networking Breakfast sponsored by FAE USA

9:15AM – 10:30AM ————— General Session sponsored by VitalEdge Technologies

10:30AM – 2:30PM ————— Conference Dealer Expo – CONDEX

10:30AM – 5PM ————— Hospitality/Meeting Room Suites

11AM – 12PM ————— Workforce Development Committee Meeting (by invitation only)

1PM – 2PM ————— Public Policy Council (by invitation only)

2:15PM – 3:15PM ————— Far West Advisory Committee (by invitation only)

2:30PM – 4:45PM ————— Professional Education Sessions

2:30PM – 4:45PM ————— Conference Dealer Expo – CONDEX (private meetings)

3:30PM – 4:30PM ————— Manufacturer Advisory Council Meeting (by invitation only)

4:45PM – 6:45PM ————— Summit Networking Reception sponsored by Ritchie Bros.

FRIDAY, JANUARY 17

7:30AM – 8:30AM ————— Summit Fun Run/Walk sponsored by 1st Source Bank

8AM – 2PM ————— Registration

8:15AM – 9:15AM ————— The AED Foundation Vision 2025 Champagne Breakfast (by invitation only)

8:15AM – 9:15AM ————— Canadian Member Breakfast (by invitation only)

8:45AM – 9:30AM ————— Summit Networking Breakfast

9:30AM – 10:30AM ————— General Session

10:30AM – 11:30AM ————— Emerging Leaders Council (by invitation only)

10:30AM – 2:30PM ————— Conference Dealer Expo – CONDEX

10:30AM – 5PM ————— Hospitality/Meeting Room Suites

11:30AM – 12:30PM ————— Women In Equipment Advisory Group (by invitation only)

2:30PM – 4:45PM ————— Professional Education Sessions

6:30PM – 9PM ————— Keynote Dinner with Former U.S. Attorney General William P. Barr
hosted by PEAC Solutions





HOTEL INFORMATION

BOOK NOW!

- **TAKE ADVANTAGE OF AED'S EXCLUSIVE ROOM BLOCK PRICING**

- **HOTEL RESERVATIONS**

Hotel reservations are not included with your registration. Book your hotel room within one of the AED Summit Room Block options below.

- **Hyatt Regency Orlando**

9801 International Drive
Orlando, FL 32819

Run of House Rate: \$219+tax

Upgraded King Room: \$319+tax

- **Renaissance Orlando at SeaWorld**

6677 Sea Harbor Drive
Orlando, FL 32821

Run of House Rate: \$244+tax

(plus \$25 per day resort fee + tax)

- These room blocks are in high demand. Rooms are available on a first-come, first-serve basis. AED room block rates are available until December 23, 2024, or until the room block is full. Once the room blocks are full, the AED discounted room rates are no longer guaranteed.

NEW THIS YEAR

The link to book your hotel room will be sent to you automatically once you have registered as a Summit attendee.

Reservations are limited to (2) reservations per name and/or email address. If you require more than (2) rooms per name and/or email address, please contact us at aedsummit.com.

BEWARE OF UNOFFICIAL HOUSING OFFERS

Please be aware that some third-party travel companies may attempt to solicit you regarding housing for the 2025 AED Summit. These companies are not authorized by AED and may provide false information.

AED does not use any housing agencies related to our events.

AED does not share or sell the registered attendee list externally to any companies not participating in AED Summit.

REGISTRATION

Individual Registration Fee Includes:

- Education Sessions
- Hospitality/Meeting Room
- General Sessions
- Receptions
- Keynote Dinner
- Breakfasts and Lunches
- CONDEX

Spouse/Family Member Registration

For Spouse/Family Members that would like to attend the AED Summit breakfasts, lunches and receptions, AED offers a reduced registration fee.

AED Foundation Fundraising Gala

Tickets for the AED Foundation Fundraising Gala are not included in the individual registration fee but can be purchased during the registration process for \$300 per person.

AIRPORT & GROUND TRANSPORTATION

Hyatt Regency Orlando: Orlando International Airport (MCO) is approximately 12 miles from the Hyatt Regency Orlando. Estimated rideshare time is 15 minutes with an estimated cost of \$35. Prices will vary on date, time and size of vehicle.

Renaissance Orlando at SeaWorld: Orlando International Airport (MCO) is approximately 13 miles from the Renaissance Orlando at SeaWorld. Estimated rideshare time is 20 minutes with an estimated cost of \$40. Prices vary on date, time and size of vehicle.

DRESS CODE

General Session & Meetings: Business Casual
Receptions & After Hour Events: Business Casual
Keynote Dinner: Business Attire

AED CANCELLATION POLICY

Refunds are not permitted within 30 days of the event.



AED[®] SUMMIT

REGISTRATION FEES FOR THE 2025 SUMMIT

FEE TYPE MEMBER / NON-MEMBER	REGULAR (September 18 through January 10, 2025)	LATE (Begins January 11, 2025)
EQUIPMENT DEALER: 1 ATTENDEE	\$1,125 / \$2,250	\$1,225 / \$2,350
EQUIPMENT DEALER: 2 ATTENDEES	\$975 / \$1,950	\$1,075 / \$2,050
EQUIPMENT DEALER: 3 ATTENDEES	\$750 / \$1,500	\$850 / \$1,600
EQUIPMENT DEALER: 4 ATTENDEES	\$675 / \$1,350	\$775 / \$1,450
EQUIPMENT DEALER: 5 ATTENDEES	\$575 / \$1,150	\$675 / \$1,250
EQUIPMENT DEALER: 6 ATTENDEES	\$525 / \$1,050	\$625 / \$1,150
EQUIPMENT DEALER: 7 OR MORE ATTENDEES	\$500 / \$1,000	\$600 / \$1,100
MANUFACTURER	\$1,125 / \$2,250	\$1,225 / \$2,350
SERVICE PROVIDER	\$1,125 / \$2,250	\$1,225 / \$2,350
INDUSTRY AFFILIATE	\$1,125 / \$2,250	\$1,225 / \$2,350
EXHIBITOR (CONDEX/SUITES) & SPONSORS	\$500	\$600
SPOUSE/FAMILY MEMBER	\$400	\$500
TECHNICAL SCHOOL INSTRUCTOR	\$500	\$600

A vibrant, warm-toned photograph of a Havana-style nightclub interior. The scene is dimly lit with red and orange hues. In the foreground, there are tables and chairs, some with lit candles. A large, ornate chandelier hangs from the ceiling. The background shows a staircase and more tables. The text 'Havana NIGHTS 2025 GALA' is overlaid on the image in a stylized, glowing font.

Havana NIGHTS 2025 GALA

WEDNESDAY, JANUARY 15 2025 · 6:30PM–9:30PM · THE HYATT REGENCY ORLANDO

Join Us for an Extraordinary Evening in Support of The AED Foundation

The AED Foundation constructs pathways of opportunity for the equipment distribution industry with one goal in mind: to grow and develop support for our members.

Last year, the AED Foundation Gala & Live Auction raised over \$190,000 and was able to improve the availability of future industry employees by accrediting diesel-equipment technology college programs, advocating for greater federal investment and working to increase awareness and interest among school-age students.

Proceeds from this event help support The AED Foundation enhancing the success of AED member companies by offering long-term career pathways and continuing education for employees and improving the quantity and quality of future employees for their dealerships.

Not included with Summit Registration. Additional tax deductible ticket purchases required.

What Can You Expect?

- **Includes:** Food, open bar, live auction and entertainment
- **Dress Code:** The recommended attire for the Gala is “Havana Night Club” or resort casual attire.
- **Ticket Pricing:** \$300 for a standard ticket or \$3,000 for a premium package. The premium package includes (10) standard tickets for distribution, and the company’s logo will appear on signage.
- **Two Auctions:** Live and silent auctions are available. The AED Foundation Annual Live Auction is hosted by Ritchie Bros.

Presented by  **RITCHIE BROS.**[™]

HOSTED BY **PEAC**
SOLUTIONS

DINNER & CONVERSATION WITH **WILLIAM P. BARR** FORMER U.S. ATTORNEY GENERAL

FRIDAY, JANUARY 17, 2025 • 6:30 PM–9:00 PM



With a wealth of experience in both the public and private sectors, Barr has earned a reputation as a steadfast advocate for justice and a formidable legal mind. Today, he is a founding partner at Torridon Law PLLC and a distinguished fellow at the Hudson Institute. His memoir, *One Damn Thing After Another*, released in March 2022, achieved the status of a No. 1 New York Times bestseller.

PROFESSIONAL BACKGROUND

William Barr served as the 77th attorney general of the United States, appointed by President George H. W. Bush in 1991 and again in 2019 by President Donald J. Trump. During his tenure, Barr demonstrated unwavering commitment to the principles of the Constitution and the impartial administration of justice. His leadership was characterized by a resolute pursuit of law enforcement objectives while ensuring the protection of individual rights and liberties.

Prior to his service as attorney general, Barr held prominent positions in the Department of Justice, including serving as deputy attorney general and as assistant attorney general for the Office of Legal Counsel. In these roles, he provided invaluable counsel on a wide range of legal matters, contributing to the effective functioning of the nation's legal apparatus.

In addition to his government service, Barr has enjoyed a successful career in the private sector, serving as general counsel and executive vice president of GTE Corp. (now Verizon Communications). His expertise in corporate governance, regulatory compliance and litigation strategy has been instrumental in guiding corporations through complex legal challenges and ensuring adherence to legal and ethical standards.

EDUCATION AND LEGAL CREDENTIALS

William Barr is a graduate of Columbia University, where he earned a Bachelor of Arts degree in government. He subsequently obtained his Juris Doctor from George Washington University

Barr demonstrated unwavering commitment to the principles of the Constitution and the impartial administration of justice. His leadership was characterized by a resolute pursuit of law enforcement objectives while ensuring the protection of individual rights and liberties.

Law School, where he distinguished himself as a diligent student with a keen intellect and a passion for the law.

PHILANTHROPIC AND CIVIC ENGAGEMENT

Beyond his professional endeavors, William Barr is deeply committed to philanthropy and civic engagement. He has actively supported charitable organizations dedicated to various causes, including education, veterans' affairs and public health. His philanthropic efforts reflect a steadfast belief in the importance of giving back to the community and improving the lives of others.

LEGACY

William Barr's legacy is one of integrity, competence and principled leadership. Throughout his career, he has exemplified the highest standards of professionalism and ethical conduct, earning the respect and admiration of colleagues, peers and fellow citizens alike. As a distinguished legal scholar and public servant, Barr's contributions to the legal profession and the nation are enduring and profound.

2025 KEYNOTE SPEAKERS

JAMES CARVILLE



“THE RAGIN’
CAJUN”

AN INTERVIEW
BY BRIAN MCGUIRE

GENERAL SESSION
THURSDAY, JANUARY 16

James “the Ragin’ Cajun” Carville is America’s best-known political consultant. His long list of electoral successes evidences a knack for steering overlooked campaigns to unexpected landslide victories and for remaking political underdogs into upset winners.

His winning streak began in 1986, when he managed the gubernatorial victory of Robert Casey in Pennsylvania. In 1987, Carville helped guide Wallace Wilkinson to the governor’s seat in Kentucky. Carville continued his winning streak in New Jersey with Frank Lautenberg elected to the U.S. Senate. He next managed the successful 1990 gubernatorial campaign of Georgia’s Lieutenant Governor Zell Miller, including a tough primary win over Atlanta mayor Andrew Young. And in 1991, Carville – who had already become prominent in many political circles – drew national attention when he led Senator Harris Wofford from 40 points behind in the polls to an upset landslide

victory over former Pennsylvania Governor and U.S. Attorney General Richard Thornburgh. But his most prominent victory was in 1992 when he helped William Jefferson Clinton win the presidency.

In recent years, Carville has not been a paid political consultant for many domestic politicians or candidates, instead focusing on campaigns in more than 23 countries around the globe, stretching from the continents of South America to Europe to Africa and, most recently, Asia.

James Carville is also a bestselling author, actor, producer, talk-show host, speaker and restaurateur. His titles include *We’re Still Right, They’re Still Wrong: The Democrats’ Case for 2016*; *Love & War: Twenty Years, Three Presidents, Two Daughters and One Louisiana Home* (with wife Mary Matalin); *It’s the Middle Class, Stupid!*; *All’s Fair: Love, War, and Running for President* (with wife

Mary Matalin); *We’re Right, They’re Wrong: A Handbook for Spirited Progressives*; *And the Horse He Rode In On: The People vs. Kenneth Starr*; *Buck Up, Suck Up... and Come Back When You Foul Up*; *Had Enough? A Handbook for Fighting Back*; *Stickin’: The Case for Loyalty*; his children’s book, *Lu and the Swamp Ghost*; 2006’s *Take It Back*; and *40 More Years: How the Democrats Will Rule the Next Generation*.

Along with pollster Stanley Greenberg, Carville founded Democracy Corps, an independent, nonprofit polling organization dedicated to making government more responsive to the American people. He now co-hosts the weekly Politicon podcast *Politics War Room* with journalist Al Hunt.

Carville also serves as a fellow at LSU’s Manship School of Mass Communication and lives in New Orleans with his wife Mary Matalin.



SEAN ALEXANDER

AI DEMYSTIFY COMPLEX TECHNOLOGIES

ARTIFICIAL INTELLIGENCE

GENERAL SESSION • WEDNESDAY, JANUARY 15

Sean Alexander, an emblem of innovation and leadership in the tech realm, leverages his 25-year legacy at Microsoft to redefine digital frontiers. His keynote programs on AI demystify complex technologies, provide actionable digital transformation strategies and inspire innovative thinking for business success.

While at Microsoft, Sean built and scaled numerous business and technical initiatives with Fortune 500 partners. He also developed the Microsoft AI Executive Program for all C-suite partner engagements. His pioneering work, from co-authoring Microsoft's Applied AI strategy to orchestrating the initial OpenAI partnership, established him as a vanguard in guiding companies through AI and digital transformation and earned him a Technical Emmy®. As a global keynote presenter, Sean has shared the stage with CEOs Bill Gates and Steve Ballmer.

Currently, Sean serves as a business and technology advisor and keynote speaker with The Persimmon Group, an award-winning management consulting and learning organization. He excels at guiding organizations through continuous transformation, building AI aptitude and developing responsible AI strategies. He supports clients by advising them on transformative initiatives, organizational strategy and executive coaching.

Sean is a second-generation graduate of the University of Tulsa and a graduate of the Microsoft/Northwestern Executive MBA Program. He also holds an executive certificate in AI business strategy from MIT. Sean serves on several nonprofit boards and is a member of the National Association of Corporate Directors (NACD).



LAUREN SAIDEL-BAKER

ALIGN RESOURCES FOR THE RISE AHEAD

ITR ECONOMICS

GENERAL SESSION • FRIDAY, JANUARY 17

Lauren Saidel-Baker, CFA, is a speaker and economist at ITR Economics. She provides consulting services for small businesses, trade associations, and Fortune 500 companies across a spectrum of industries.

Since joining ITR Economics, Lauren has brought enthusiasm and in-depth insight to our analysis of various industry trends. Her expertise captivates audiences, and her experience in the financial

industry supports her extensive knowledge of the applicability of ITR Economics' programs.

Lauren graduated with honors from Wellesley College, double majoring in economics and religion. She also earned her MBA at Boston University Questrom School of Business. She has been featured on the Financial Sense Newshour podcast, in Floor Covering Weekly magazine, and in tED magazine's online publication.

MY SHOW PLANNER

As a participant in an onsite or online event, you want to ensure you are making the most of your time engaging with exhibitors online. Creating a My Show Planner account is your ticket to maximizing your show experience.

Creating An Account Allows You To:

- Compile a must-connect-with list of exhibitors
- Participate in Online Education sessions
- Create a list of new products you are interested in
- Communicate with company contacts
- Explore scheduled events
- Create a personalized show experience
- Save time on the show floor by focusing your approach
- Map out your route using the online interactive floor plan
- Increase efficiency by organizing your events and appointments all in one place

How to Create An AED Summit Planner Account:

- 1 Visit the AED Summit home page www.aedsummit.com and click "Create Your Summit Planner"
- 2 Click "Create Your My Show Account"
- 3 Fill in Required Fields on Registration Page
- 4 By Selecting "YES" in the "Connect with Exhibitors" section, your name and email will be shared with exhibitors saved in your My Show Planner
- 5 Click "Create Your Free Account" to complete your setup

New for this year, your Summit Planner will be automatically synched between your AED Summit website profile and the AED Summit app after login.



Scan the QR Code to Create Your 2025 Summit Planner

SUMMIT EXHIBITORS

Experience a diverse range of companies at AED Summit, including technology giants, trusted insurance providers, financial experts, established manufacturers, and innovative up-and-comers. Whether you're seeking cutting-edge services for your business, eager to reconnect with your trusted suppliers, or searching for fresh products to fuel your growth, these companies, and many more, will be waiting to meet you at the exciting 2025 AED Summit.

◆ = NEW EXHIBITOR FOR 2025

Exhibitor List as of 9/1/2024

- 3R Machinery by Shred-Tech
- ◆ AgDirect
- AIG Safety dba Access Innovations Global LP
- All Access Equipment
- American Bank Equipment Finance
- AMI Attachments Inc.
- Ammann America, Inc.
- ◆ ANA, Inc
- Anaconda USA Inc
- APPROVE
- Ascentium Capital
- Associated Construction Publications
- Assurant Commercial Equipment
- Astec
- AUSA US Corp
- Avant Tecno USA, Inc.
- Bandit Industries, Inc.
- Basic Software Systems
- Bell Trucks America, Inc.
- Bergmann Americas
- Black Cat Wear Parts
- BOK Financial
- BOMAG
- ◆ Canycom USA
- CASE Construction Equipment
- Cemen Tech Inc
- Connect Work Tools
- Construction Credit & Finance Group
- Construction Equipment Guide
- Cummins Inc.
- Dealer Information Systems Corp
- ◆ Deutsche Leasing USA, Inc.
- DEVELON
- ◆ Diamond Mowers
- DLL
- Doosan Bobcat North America
- DPL Telematics
- Dynamicweb North America, Inc.
- Dynapac North America LLC
- Ecoverse Industries, Ltd.
- EDGE Innovate
- ◆ Eide Bailly
- ELGi Portable Compressors
- Epiroc USA LLC
- Equify Financial, LLC
- Exodus Global
- FAE USA, Inc.
- Fecon, LLC
- Federated Insurance
- Felling Trailers Inc.
- First Citizens Bank Equipment Finance
- First Financial Equipment Leasing FRD.USA
- Fusable
- Giant Loaders North America
- Glynn General Companies, LP
- Gradall Industries, Inc.
- GRYB International
- Handle, Inc.
- ◆ HB Attachments Inc.
- HBS Systems
- HD Hyundai Construction Equipment North America
- Hemisphere GNSS
- Hensley Industries, Inc.
- Hercules Sealing Products
- ◆ HEVI
- HKX, Inc.
- Huddig AB
- HydrauliCircuit Technology, Inc.
- Hydrema US Inc.
- INDECO North America, Inc.

- Integrated Rental Systems Inc
- Interstate Billing Service
- IronConnect, LLC
- ITR America
- ◆ John Deere Agriculture & Turf
- JPMorgan Chase
- JT Bates Group
- ◆ Karmak, Inc.
- KATO/Compact Excavator Sales LLC
- ◆ Kerridge Commercial Systems
- KLC Financial LLC
- Knapheide Manufacturing Company
- Kohler Energy - Engines
- Komplet America
- KRT Equipment
- ◆ Kubota Tractor Corporation
- LBX Company LLC
- ◆ LeeBoy
- Liebherr USA, Co.
- Lienguard LLC
- ◆ Lippmann Milwaukee, Inc.
- LiuGong Construction Machinery N.A. LLC
- ◆ Loftness Specialized Equipment
- M&J US Inc.
- Manitou North America
- Manitowoc Cranes
- MB America, Inc.
- ◆ McCloskey International
- Mecalac
- Mega Corp Inc.
- ◆ Merlo America LLC
- ◆ Metso
- Midland Equipment Finance
- Mitsubishi HC Capital America, Inc.
- Montabert
- Morbark, LLC
- ◆ New Holland Construction Equipment
- Normet Americas, Inc.
- Northland Capital Equipment Finance
- ◆ Nucor Building Group
- Oakmont Capital Services
- OilQuick Americas
- Okada America, Inc.
- PEAC Solutions
- Performance Brokerage Services
- Pinion
- PNC Vendor Finance
- ◆ Ponsse Plc
- Prinoth
- PSG Jobs Veteran Placement
- Purple Wave Auction
- Quipli
- RB Global
- Record360
- Rockland Manufacturing Co.
- RockZone Americas
- ◆ Rotobec, Inc.
- Rototilt Inc.
- Rouse Services
- RubbleCrusher
- S.I.BO. srl
- Sakai America, Inc.
- Sandhills Global
- Sandvik
- Sandvik Rock Processing North America (Rammer)
- SANY America, Inc.
- SATISFYD
- Sennebogen LLC
- Sentry Insurance Company
- Seppi m. USA
- ShearCore
- Simex
- ◆ SLR Equipment Finance
- SmartEquip Inc.
- Soosan USA, Inc
- Specialty Equipment Insurance Services, Inc.
- STANLEY Infrastructure
- ◆ Stellar Industries
- Stewart-Amos Sweeper Co.
- Stucchi USA, Inc.
- Suite Engine, LLC
- Sullair, LLC
- Sullivan-Palatek
- Superior Industries
- Superior Tire & Rubber Corp.
- Takeuchi
- TARGET
- Terramac
- Texada Software
- The Stanek-Haack Group at Morgan Stanley
- Thunder Creek Equipment
- Tinnacity LLC
- Toku America, Inc.
- Topcon Positioning Systems
- Trnsact
- TVH Parts Company
- U.S. Bank Equipment Finance
- UTV International
- VF VENIERI S.p.A.
- ◆ visorPRO
- VitalEdge Technologies
- VizaLogix
- Volvo Construction Equipment Haulers Limited
- Volvo Construction Equipment North America, Inc.
- Volvo Penta
- WainRoy Construction Attachments
- Warranty Consulting Services LLC
- WEIR ESCO
- Wells Fargo
- Werk-Brau Co, Inc.
- Witzco Challenger Trailers Inc.
- WTC Machinery LLC
- XCMG North America Corp.
- Yanmar Compact Equipment North America



EDUCATION SESSIONS

Plan your educational sessions in advance! The AED Summit features dozens of in-depth educational sessions and workshops designed to provide you, your team and your company with the tools and insights you need for continued growth and success.

Education Sessions as of 9/5/2024

For a complete list of education sessions please visit www.aedsummit.com.

LEADERSHIP

EMPOWERING EQUIPMENT DEALERS: STRATEGIC PLANNING WITH AI FOR ACCURATE FORECASTS & GROWTH-DRIVEN METRICS

Steve Clegg • Winsby Inc. • Industry Focus: All Industries

In a rapidly evolving market, equipment dealers face unique challenges in developing effective strategic plans that drive growth and profitability. This session will showcase how artificial intelligence (AI) is revolutionizing the strategic planning process, enabling dealers to create realistic plans backed by accurate forecasts and key metrics to verify performance and measure initiatives for products and services offered, customer engagement, retaining customers and employee selection and team building.

Key topics include:

- The limitations of traditional strategic planning methods and how AI can address them
- Harnessing AI-powered analytics to gather and analyze vast amounts of data from various sources, including market trends, customer behavior, and competitor performance
- Utilizing AI algorithms to generate accurate sales and revenue forecasts, considering factors such as seasonality, economic conditions, and product life cycles
- Leveraging AI-driven scenario planning to test various strategies and evaluate their potential impact on growth and profitability
- Best practices for integrating AI into the strategic planning process and ensuring organization-wide adoption

PASSING THE TORCH: ENSURING SUCCESS ACROSS GENERATIONS IN YOUR EQUIPMENT DEALERSHIP

Brad Stanek • **The Stanek-Haack Group at Morgan Stanley** • **Industry Focus: All Industries**

Are you looking to transition your dealership to the next generation in the next 3-5 years? The statistics are sobering: 66% of businesses fail to survive beyond the second generation and the stakes could not be higher for retiring owners and their successors. This transition not only affects the financial stability of the parents, who often rely on the income or proceeds from a sale to their children, but also the future success of the next generation tasked with running the dealership. In this session, we will equip you with the knowledge to start the process at the right time, navigate the common pitfalls, and implement essential practices to greatly enhance your chances of a successful handover.

Key topics include:

- Identifying the optimal timing for initiating the transition process and the key preparatory steps needed to ensure a smooth handover to the next generation
- Insights into the common challenges and mistakes that occur during transitions and how to navigate them effectively
- Gaining the knowledge to build out your own comprehensive and actionable plan that addresses the personal, financial, legal, and operational aspects of passing a dealership to the next generation
- Understanding how to foster effective communication between generations to ensure alignment of goals, expectations, and business practices

THE NEW LEADERSHIP PLAYBOOK

Nate Gibbons • **QuickFi** • **Industry Focus: All Industries**

Most leadership advice focuses on intrinsic gifts that are difficult to learn (like “vision”) or specific, discrete skills that can take years to master (like “effective communication”). While these are great attributes of an effective leader, the pursuit of them can prove to be frustrating and even futile—particularly in an age where the world and the people in it are changing at an alarming rate. In a rapidly changing world, effective leadership becomes less about mastering traditional leadership skills over time and more about learning agility—the ability to learn faster at scale.

In this session, attendees will:

- Discuss the phenomena that have caused shifts in human behavior (e.g. technology, geopolitical events, social conditioning, etc.)
- Discuss specific examples of new mindsets and expectations of those we are leading and why traditional leadership approaches may no longer be effective
- Understand specific, practical ways to accelerate learning and more quickly adapt as circumstances require, resulting in less wasted time pursuing skills that may soon become obsolete (if they aren’t already), and a shorter path for the leader, the organization, and its people to reach their potential

WHAT CREATES A BIG DEALER? CE VS. AG

George Russell • **Machinery Advisors Consortium** • **Industry Focus: Construction & Agriculture**

With the publication of the first CE Big Dealer Report, dealers, OEMs and suppliers will learn about the different drivers of scale between Farm and Construction Equipment dealers. With over 10 years of analysis, the annual Ag Big Dealer Report shows the consequences of producer consolidation, global commodities competition, OEM policies, and applied technology. CE has different economic drivers: many more OEMs both old and new to NA, and a more diverse need to serve customer needs, especially for rental. Dealers in both industries grow successfully by developing leaders, growing capital and becoming trusted advisors to their customers.



ENERGY MARKETS & THEIR ECONOMIC IMPACT

Matthew Stephani • Cavanal Hill Investment Management (Part of BOK Financial)

• Industry Focus: All Industries

At the time of delivery, the inauguration of a new administration will be imminent. The President-elect will determine foreign and domestic policy that will have a significant impact on energy markets.

Globally there has been a significant investment in clean energy with spending on renewable power grids and storage surpassing oil, gas and coal. At the same time, investments in data centers and artificial intelligence is driving a substantial increase in demand for electricity.

The energy transition is not just reshaping energy production but also related industries, including equipment distribution. The energy transition coupled with electrification of the economy is likely to drive increased demand for construction services and equipment.

Attend this session to gain an understanding of global energy markets and demand drivers that will have a significant impact on your business, and learn why you should prepare for the potential increased demand for both alternative and fossil fuel energy as well potentially higher energy prices.

AG OUTLOOK: SUNNY OR A CHANCE OF STORMS?

Marc Johnson • Pinion Global • Industry Focus: Agriculture

When you're at the beach, it's all about catching the right wave and soaking up the sun. Just like reading the tides, you need to be prepared to ride the waves of economic change when you get back to your dealership.

In this session, professionals from Pinion (formerly known as KCoE Isom) will provide you with an outlook on what equipment dealers can expect in 2025 and beyond, ensuring you have the brightest path ahead.

Ag dealers will benefit from Pinion's insights on the current economic climate for your customers—discover what's on the horizon for the Ag economy, including commodities, production, price expectations, and government programs like the Farm Bill. For those with CE as well, you will get a clear forecast on the housing industry and the broader economy. And just as you'd want to avoid getting burned in the sun, everyone will appreciate understanding how upcoming, pending, and rumored tax legislation could impact their financial future as we prepare for a new presidential administration.

MANAGEMENT

FROM BLUEPRINT TO REALITY: NAILING TODAY'S WORKFORCE, FRAMING TOMORROW'S TALENT, CEMENTING YOUR FUTURE

Kristie Stern & Amanda Thibault • Green Mountain Lion Corporation • Industry Focus: All Industries

This session will focus on the critical balance between meeting today's workforce demands and strategically planning for long-term success. It will explore how identifying and nurturing hidden talents can drive innovation and resilience within your company, ensuring you have the right team in place for both immediate and future challenges.

Content includes:

- Interview techniques to identify a candidate's long-term goals, ensuring they align with the company's growth plan
- Creating a career trajectory plan for each employee
- Identifying and fostering hidden skills that meet future needs
- Building a strong, adaptable workforce that supports sustained growth and success
- Hiring for a position with the intention of fostering individual growth through the next two career progressions within the company

HIRING, ONBOARDING, & RETAINING MILITARY VETERANS

Chad Miller • PSG Jobs Veteran Placement • Industry Focus: All Industries

Tapping into the transitioning U.S. military veteran talent pool is a great way to grow your dealer/distributor group teams. In this informative session, you will learn the best practices for contacting and hiring military veterans and techniques and strategies to properly on-board your military veteran hires. Attendees will also learn best practices for retaining your military veteran hires and creating developmental career paths for these team members.

UNDERSTANDING THE NEW & USED SALES MIX

Casey Seymour • Moving Iron LLC, a member of Machinery Advisors Consortium • Industry Focus: All Industries

When a dealership understands the new and used equipment sales ratio, they have a road map to success. The dealership will see the future and can make proactive plans and not knee-jerk reactions. This session will demonstrate how to calculate a dealership's new-to-used sales mix, the downstream effects, and how their inventory will increase or decrease based on selling new to satisfy manufacturer market share goals.

DEVELOPING A SUSTAINABLE PIPELINE OF TECHNICIANS THROUGH APPRENTICESHIPS

Eric Hill, Youth Workforce Development Foundation • Sean Fitzgerrel, The AED Foundation

• **Industry Focus: All Industries**

Attend this session and discover how The AED Foundation and the Youth Workforce Development Foundation have created a sustainable model to support employers within the equipment supply chain. Leveraging a federal grant, these organizations will assist your company through Career Awareness Days and foster partnerships with state apprenticeship agencies, SkillsUSA state associations, high schools, and local Workforce Investment Boards. This session will also guide your organization in developing youth-focused pre-apprenticeship programs and transitioning participants into full registered apprenticeship programs. Join us to learn how these initiatives can benefit your workforce development efforts.

MANAGING CUSTOMERS, SALES, AND LENDERS THROUGH THE RETAIL FINANCE PROCESS

Toby Gelinas • DFS Solutions • Industry Focus: All Industries

Financing is a stressful process for everyone: customers are anxious to get approved, sales reps are nervous they'll lose the sale, and banks are scared of making a bad decision. So how do you keep everything on track and everyone calm?

In this session, attendees will learn the secrets of navigating the turbulent process that is retail finance, exploring the subject from the viewpoints of all parties involved. Attendees will get concrete advice for implementing systems and processes that make the process smooth, including practical strategies for lender management, sales management, and customer service to help you win hearts and minds.

SALES

WHAT WE HAVE LEARNED FROM 20 YEARS OF CUSTOMER INTERVIEWS

Lynn Daniel • The Daniel Group • Industry Focus: All Industries

In today's competitive B-to-B landscape, understanding and improving customer experience (CX) is crucial for sustained success. Drawing on over one million surveys collected from leading industry clients, this session will delve into the key factors that drive customer engagement and satisfaction.

Attendees will gain valuable insights into the most critical elements of CX that engage customers and learn about the common pitfalls that can turn them away. The session will also introduce the concept of rational vs. emotional engagement, offering practical strategies to build stronger connections with customers—especially through emotional engagement.

Whether you're looking to refine your CX strategy or enhance your customer relationships, this session will equip you with actionable knowledge to elevate your business performance.

THE FUTURE OF CUSTOMER ENGAGEMENT STRUCTURE & SYSTEMS

Bill Johnson • GreatAmerica Financial Services • Industry Focus: Construction & Agriculture

The way we transact and sell has changed and will continue to change, so the way we create a good customer experience and customer engagement must also change. From online support to chat support to using text messages—customers have different preferences on how they want to interact.

This session will answer the following questions:

- How do customers want to engage in the sales process?
- How do customers want to receive support?
- What structure do you need to best support your customers?
- What skills and capabilities will you need to best support your customers now and in the future?
- What have we learned about evolving customer engagement and experience?

DATA-DRIVEN USED EQUIPMENT APPRAISALS FOR AG & CE

Leo Johnson • Machinery Advisors Consortium • Industry Focus: Construction & Agriculture

Dealership growth and diversity of products marketed by the dealership have increased the role of the used equipment appraiser and marketer. Attend this session and learn how to do more in less time and thrill your customers with the quick turnaround of your equipment quote.

YOU CAN ALWAYS SELL MORE! HOW TO DIFFERENTIATE YOURSELF AND YOUR COMPANY AND ESTABLISH A STRONGER VALUE PROPOSITION

Jim Pancero • Industry Focus: All Industries

Selling (and sales leadership) have been going through dramatic changes in just the last five years. Successful selling, and gaining a competitive edge, have become critical to maintaining your competitiveness and increasing your sales. How much are you changing right now? Buyers today are harder to reach, less loyal and more price sensitive. How are you adjusting your team's selling efforts to successfully win in these new realities?

In this session, you will learn:

- How to increase your effectiveness and avoid today's selling traps that most sales pros are experiencing
- How to communicate more value to increase your competitive advantage and positioning in your markets
- How to shift to a more predictive/proactive service philosophy
- How to make your selling language more buyer-focused by incorporating the "Four Core Values" of selling into your selling language

RENTAL

HOW TO SAFELY GROW YOUR RENTAL SALES

Jayme Bates • JT Bates Group • Industry Focus: All Industries

The rental industry is highly competitive, and demand is rapidly accelerating. Dealers must evaluate every business practice in search of opportunities for growth and efficiency. Many dealers/rental houses are grappling to figure out the best ways to grow their rental business and safeguard their equipment. Attend this session for an insightful discussion about mitigating risk and protecting the rental business and its assets, all while continuing to increase rental revenue.

LEVERAGING DIGITAL TO GROW DEALERSHIP RENTAL

Alise Moncure, Integrated Rental • **Robert Cox, Ohio CAT**

• Industry Focus: Construction & Agriculture

Digital transformation is more than a trend—it's a necessity. This session will not only explore how dealerships can harness the power of digital tools and strategies to enhance rental growth, efficiency, and customer satisfaction, but also provide practical insights and strategies to be implemented immediately. By the end of this session, participants will be equipped with the knowledge and tools necessary to effectively leverage digital to drive growth in their rental business. Key concepts include:

- Understanding current digital transformation in the rental industry
- Exploring the dos and don'ts of rental software
- Enhancing customer experience through digital
- Dealer-specific strategies backed by digital



INTUITIVE BUSINESS INTELLIGENCE FOR RENTAL

Greg Bennett • **Kerridge Commercial Systems** • **Industry Focus: All Industries**

Bid farewell to the constraints of manual reporting and spreadsheets, and step into the realm of revolutionary opportunities that 'Business Intelligence' can offer your rental business. Topics include:

- How to achieve a single version of truth across sales, inventory, purchasing and finance
- Shifting from static reports and spreadsheets to dynamic reporting
- The power of data visualization and dashboards

Discover how you can transform how you handle and analyze your business data through dynamic dashboards and real-time reporting that seamlessly adapts to your requirements, delivering actionable insights at your fingertips.

LOSS PREVENTION IN THE RENTAL PROCESS

Glenn Jacobs • **Fairview Insurance Associates** • **Industry Focus: All Industries**

In this session, participants will explore essential strategies to mitigate fraud and deceit during the rental process. Topics covered include safeguarding against fraudulent insurance claims, implementing effective cyber liability security measures, and ensuring proper contract wording in rental or lease agreements. Best practices for managing the entire rental process within a dealership will also be discussed, with a focus on obtaining and verifying certificates of insurance to reduce risk and protect assets.

PRODUCT SUPPORT

THE FUTURE OF PARTS & EQUIPMENT SUPPORT: EMBRACING ECOMMERCE

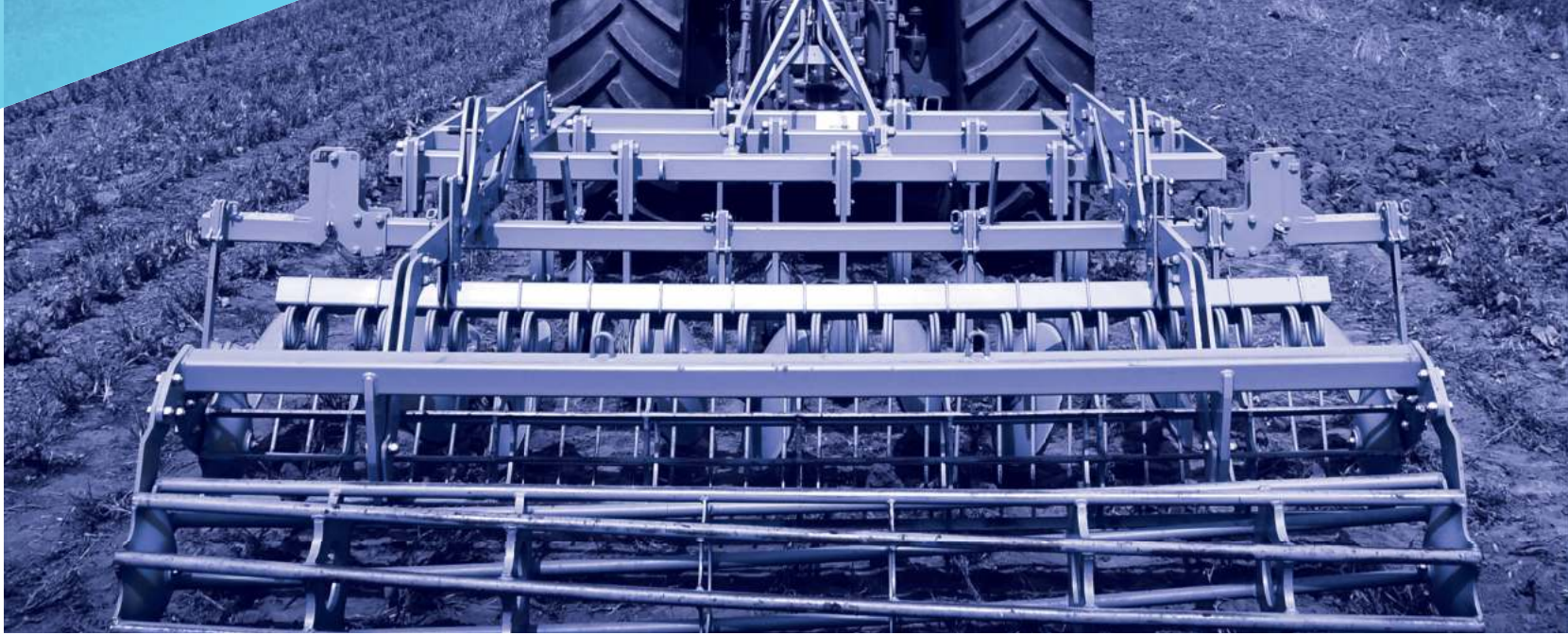
Kristina Harrington • **GenAlpha Technologies** • **Industry Focus: All Industries**

In the rapidly evolving world of parts and equipment sales, eCommerce is no longer just a luxury – it's a necessity. This session will explore the critical eCommerce trends that equipment dealers, service providers and manufacturers must embrace to stay competitive and meet customer expectations.

Key topics include:

- **The Rise of Online Purchasing:** Understanding the rapid growth of B2B eCommerce channels and the evolving buyer expectations
- **Multichannel Sales Strategies:** Exploring various online sales methods, including direct sales, dealer portals, and third-party platforms
- **Enhanced Product Information:** The importance of providing detailed product descriptions, attributes, cross-references, and fitment information to improve the buying experience
- **Strategic Adoption and Training:** Focusing on internal and external awareness, communication, training, and incentives to ensure successful eCommerce adoption
- **Data-Driven Optimization:** Leveraging website data and analytics to continuously improve the online buying experience and drive sales growth.

Attendees will learn how to implement best-in-class eCommerce solutions, enhance customer experiences, and position their businesses as leaders in the digital age.



WHY SERVICE DEPARTMENTS UNDERPERFORM

John Dowling • Jordan-Sitter Associates • Industry Focus: All Industries

This session will discuss four issues that cause service departments to underperform to help attendees develop a list of action items to be implemented at their dealerships when they return.

Attendees will leave this session with:

- A better and deeper understanding of the service process so as not to neglect the service department but manage it well
- An understanding of the difference between repairing the customer's equipment and managing the process of repairing the customer's equipment
- Learning the impact of aged work orders on the dealership's finances and that aged work orders are an indicator of underperformance of processes within the service department
- The knowledge that product support, particularly the service department, drives overall customer satisfaction, and employee satisfaction within the service department has a direct correlation to the dealership's customer satisfaction

GOT ABSORPTION? PARTS & SERVICE STRATEGIES IN A SLOWING ECONOMY

Bill Hoeg • WMH Consulting, a member of Machinery Advisors Consortium • Industry Focus: All Industries

In a slowing economy, maximizing the profitability of every department is critical for dealership sustainability. This session will dive deep into the concepts of parts, service, and rental absorption, focusing on how these areas can effectively cover the operational costs of your dealership. Participants will learn to identify the key triggers that drive absorption in these departments and explore proven processes and strategies to enhance their contribution to the dealership's bottom line. Whether you're looking to optimize existing operations or implement new strategies, this session will provide the insights needed to navigate challenging economic times.

PARTS INVENTORY HEALTH: EXCELLENT OR ON LIFE SUPPORT?

Wayne Brozek • WB Global Service, a member of Machinery Advisors Consortium
• Industry Focus: Construction & Agriculture

Learn the key metrics and processes to keep your inventories healthy. The basic understanding of measuring some key metrics in your parts room will reveal some non-negotiable items that the parts department needs to do daily so that inventory can stay healthy.

BRIDGING THE DIGITAL GAP: HOW DEALERS CAN GET A COMPETITIVE EDGE WITH THEIR PARTS SALES & SERVICE

Luke Powers • Gearflow • Industry Focus: Construction

Nine out of 10 parts transactions at dealers today are still handled in-person or on the phone. That's pretty unbelievable, considering it's been 15 years since the first iPhone hit the market and mobile eCommerce began its meteoric rise in our daily consumer lives.

Yet in the equipment industry, a wide chasm between manual, offline parts transactions and building a cart online remains. Why? Because we don't buy parts the same way we purchase paper towels and shoes.

The parts transaction — the profit center for today's dealers — is fraught with known-unknowns, which take collaboration and conversations to resolve. But relying on calls and walk-ins are holding both you and your customers back from unlocking growth. So how can we build on the personal quality of service and expertise your dealer branch provides, all while lowering your cost to serve and improving your customers' uptime?

Attend this session and explore ways to close the gap between offline inefficiencies and faster, easier digital parts transactions that meet your customers where they're at.

We'll dive into industry-exclusive data that reveals:

- How the true cost of offline response times impacts both your customers' margin opportunities and your bottom line
- Where the opportunities exist to offer proactive parts recommendations based off insights from thousands of mixed fleet transactions
- What innovative parts teams are doing today to improve customer satisfaction and loyalty while increasing sales

Learn what a future looks like that captures that middle ground to scale your parts revenue and manage your customers' fleets: a win-win for both sides.

TECHNOLOGY

IDENTIFYING EMERGING TECHNOLOGIES MOST CRITICAL FOR DEALER SUCCESS

Sean McLaughlin • Craig Taylor Equipment/Flyntlok Software • Industry Focus: Construction & Agriculture

The dealer landscape is changing rapidly as technology is being embedded in equipment and all aspects of operations in construction, agriculture, and more. With the rapid expansion of artificial intelligence, telematics, electric vehicles, IoT, and more, new technologies will continue to drive dealer innovation.

As a dealer principal, Sean McLaughlin is uniquely positioned to speak on which technologies are critical to the future of advancing a successful dealership. This session will discuss AI, telematics, and more with the objective of identifying what matters to dealers now versus what needs to be considered for the future.

INTRODUCTION TO AGRICULTURAL EQUIPMENT INTEROPERABILITY

Austin Gellings • Association of Equipment Manufacturers (AEM) • Industry Focus: Agriculture

In this session, attendees will learn about the Agricultural Industry Electronics Foundation (AEF) and how it is developing tools such as ISOBUS and various ISOBUS functionalities to solve for tractor implement interoperability. Attendees will also learn about the AEF database, which is a resource to help dealers and farmers determine if tractors/implements from different brands are interoperable.

HOW AI PREDICTIVE MAINTENANCE IS DRIVING REVENUE

Shawn Bonnington • VizaLogix • Industry Focus: Construction

The convergence of equipment telematics, AI, and APIs is transforming the way equipment dealers operate and generate revenue. By harnessing the power of these technologies, dealers can unlock the full potential of predictive maintenance, driving significant improvements in customer satisfaction, equipment uptime, and, ultimately, sales growth.

This session will delve into:

- The power of telematics data: Explore how telematics systems collect and transmit real-time data on equipment health, usage, and performance, providing dealers with invaluable insights
- AI-powered predictive maintenance: Discover how AI algorithms analyze telematics data to predict potential equipment failures, enabling proactive maintenance and minimizing costly downtime
- APIs for seamless integration: Learn how APIs connect telematics data with CRM systems, allowing dealers to create a unified view of their customers and equipment, streamline sales processes, and identify upsell opportunities
- Case studies of successful implementation: Hear from industry experts who have successfully leveraged telematics, AI, and APIs to enhance their predictive maintenance programs and drive revenue growth
- The future of equipment sales: Gain a glimpse into the future of equipment sales, where data-driven insights and predictive maintenance are essential for success

Attendees will leave this session with a clear understanding of how to harness the power of telematics, AI, and APIs to revolutionize their predictive maintenance programs and drive significant sales growth. They will also gain practical insights and actionable strategies that can be applied immediately to their businesses.

AG AUTOMATED INTELLIGENCE

Russ Green • MACKAYBEN, a member of Machinery Advisors Consortium • Industry Focus: Agriculture

“Your wristwatch is digital, why not your dealership?”

There are two very dynamic impacts on the performance of an agricultural dealership in today’s climate. The first is the deployment of an effective business CRM, the second is the digitization of the dealers’ intellectual property or business knowledge.

In this session, participants will be introduced to how automating their business systems with the investment and utilization of an AI platform can significantly impact their employee performance and the customer experience driving productivity to new heights.

OEM AI platforms are being deployed with varying levels of dealer acceptance and success. This program will explore the strengths and differences of the AI platforms available to dealers and how dealer utilization can be a game changer for speed and accuracy of the dealer performance across all departments of service, parts, and wholegoods sales.


REV UP EFFICIENCY: HARNESSING AI FOR BACK OFFICE BRILLIANCE

Jennifer Albright • Spend Right Consulting • Industry Focus: All Industries

AI isn’t going anywhere - you can ignore it or you can use it to your best advantage. This session will cover ways to incorporate the power of AI throughout the back office to streamline processes and boost efficiency at your dealership. We’ll cover tips for using AI in finance, budgeting, HR, and marketing/CRM as well as protecting your data security along the way.

The logo for the AED Summit. The word "AED" is in a large, bold, blue sans-serif font. The letter "A" is stylized with a green triangle pointing upwards inside its left vertical stroke. A small registered trademark symbol (®) is located at the top right of the "D". Below "AED", the word "SUMMIT" is written in a smaller, blue, spaced-out sans-serif font.

AED[®] SUMMIT

A photograph of a city skyline at dusk or dawn, reflected in a body of water. In the foreground, a large, illuminated fountain with a spherical top is the central focus. The water is calm, creating clear reflections of the buildings and the fountain. The sky is a mix of blue and orange, suggesting the time is either early morning or late evening. The buildings are lit up, and some windows are glowing.

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