



PROGRAMS AND SERVICES GUIDE

Elevate. Connect. Succeed.
Your AED Membership Guide to Growth & Excellence

MAXIMIZE THE VALUE OF YOUR AED MEMBERSHIP

Management Development

Professional Development

Continuing Education

Technician Certifications

Networking Opportunities

Benchmarking Reports

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PREPARING FOR THE FUTURE

TAKE ADVANTAGE OF YOUR AED MEMBER BENEFITS



As a way of providing our members with all the tools they need to benefit personally and professionally, we are pleased to provide you our Programs and Services Guide. This resource guide is your one-stop shop for all of AED's industry leading education, conferences, reports and more.

Show your employees that you're serious about their professional growth by registering for one or more of these industry-specific educational sessions and events. Study the items, including webinars, networking opportunities, self-study courses, technical assessments and benchmarking reports that address your interests and needs.

How should this resource guide be used?

This publication is designed as a guide, rather than a brochure that should be read from cover to cover. It is intended to be used as:

- A resource for leaders within the equipment industry to develop the skill sets and knowledge of their dealership's employees.
- A resource for professional development and educational opportunities offered by AED and The AED Foundation.
- A blueprint that provides solutions for improving departmental performance.

Keep this resource guide handy as a tool to meet all your organizational needs. If you have any additional questions about the content within this guide, call your regional manager, or visit www.aednet.org or www.aedfoundation.org.

AED and The AED Foundation thank you for your continued support, and we look forward to helping your organization succeed.

Sincerely,

A handwritten signature in black ink that reads "Brian P. McGuire". The signature is written in a cursive, flowing style.

Brian P. McGuire

President and CEO

Associated Equipment Distributors

AED MEMBER SERVICES

AED provides a variety of services and business development opportunities for our members at a reduced rate, and we want you, as an active member, to take full advantage of your membership! Everything AED provides to our membership is designed to enhance the ongoing success and profitability of businesses by providing public policy and advocacy, industry-specific education, career development opportunities, research, benchmarking reports and networking platforms to facilitate business-to-business interactions.

AED is your pathway to flexible learning opportunities that accommodate every level of dealership employee from apprentice to executive. The AED Foundation's wide variety of professional education services includes position-specific certifications, seminars, webinars, self-study courses and on-site custom programs in management, parts, service, sales, and rental. Members also receive our award-winning monthly publication, *AED Magazine*.

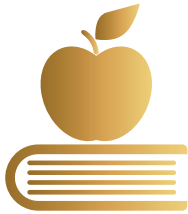
Leverage the expertise of your AED regional manager. They'll make it incredibly easy to become involved and engaged in the Association to ensure you're getting the most from your membership.



BENCHMARKING REPORTS



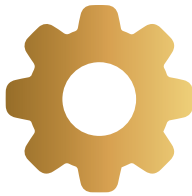
NETWORKING OPPORTUNITIES



EDUCATION & SEMINARS



PUBLICATIONS



**SPECIAL PROGRAMS
& SERVICES**



**SPECIAL BENEFITS
& OFFERINGS**

NETWORKING & EDUCATIONAL EVENTS

SUMMIT

SUMMIT IS YOUR COMPANY'S STARTING POINT FOR THE YEAR

The AED Summit is your annual opportunity to come together with professionals across the equipment industry spectrum to improve yourself and your team and to build meaningful connections. Companies travel from all over the world to attend Summit. Don't miss your chance to meet with like-minded industry professionals!

What is the AED Summit?

- The Summit is the **ONLY** industry event that brings together equipment distributors, manufacturers, and service providers under one roof.
- Dealers attend to find new products to distribute, learn what's new that can help their businesses, and network with industry peers.
- Manufacturers attend to meet with their existing dealers and with new potential dealers for their equipment.
- Service providers attend to offer their ever-expanding portfolio of products and services to a wide range of equipment dealer organizations.



FINANCIAL/HR SYMPOSIUM

The Financial/HR Symposium is **THE** event for all finance and HR professionals in the equipment industry, whether new or seasoned.

AED's Financial/HR Symposium is a rare industry-specific opportunity to re-certify Professional Development Credits (PDC's) for SHRM-CPSM or SHRM-SCPSM or CPE credits registered with the National Association of State Board of Accounting (NASBA). Learn from industry experts on both the finance and HR side about the most pressing topics impacting equipment distributors. Bring back tools and solutions to the issues that are affecting your dealership and earn those professional development credits in the process!



I thought the experience was very useful and will recommend participation by other members of my company.

ALLEN RUQUS, Jesco Inc.

FOR ADDITIONAL
EVENT AND UPDATED
INFORMATION VISIT
bit.ly/2025AEDEvents

NETWORKING & EDUCATIONAL EVENTS

AED POLICY CONFERENCE & ADVOCACY DAY

The AED Policy Conference & Advocacy Day is the equipment industry's premier public policy event. What happens in Washington has a significant impact on your company's bottom line and profitability. AED's government affairs team does an excellent job representing your interests in Washington, but lawmakers also need to hear directly from business leaders like you about how their decisions on Capitol Hill affect our companies and their employees. AED will get you up to speed on everything you need to know, including the top issues impacting the industry, how to effectively advocate for your company and what to say in your meetings with congressional offices. We'll even schedule your meetings for you!



Beyond affecting policy, attending the AED Policy Conference & Advocacy Day gives you important political intelligence to help your business planning and excellent opportunities to network with other equipment industry leaders from across the country.

“AED's impact and visibility in Washington, D.C., are second to none. Equipment dealers must address misconceptions in the current polarized political environment. I can attest to the impact that AED's Policy Conference and Advocacy Day has on important issues in our industry.

John Shearer, CEO of 4Rivers Equipment & Former AED Chairman

LEADERSHIP CONFERENCE

Business relationships between employees and customers thrive when you have an effective and diverse leadership team in all areas of operation – from the branch level to the corner office. Cultivating those leaders requires education and networking opportunities. As the equipment distribution industry becomes increasingly competitive, it is more important than ever before to invest in leadership development for the future of the business.

How prepared are those in your business who are or will enter leadership roles? Take the opportunity to set up the new and future leaders in your dealership for success by sending them to the AED Leadership Conference.



Attending will enable professionals to grow by delivering actionable content on leadership principles, the most relevant industry information, technology updates, and a platform to grow their professional networks and to learn from their peers. The Leadership Conference is one of the most highly anticipated industry events of the year across North America. There are many reasons attendees return year after year, including preparing for a promotion, inspiration for improving and motivating the team, and the overall quality of the program.

NETWORKING & EDUCATIONAL EVENTS

PARLIAMENT HILL DAY

The Parliament Hill Day provides AED's Canadian members the opportunity to learn about how federal policy affects equipment markets and your bottom-line while gaining valuable political intelligence to help plan your business. It also allows industry leaders to influence the policymaking process and build relationships with leading lawmakers and government officials. You won't want to miss the equipment industry's premiere Canadian public policy event.



WOMEN IN EQUIPMENT CONFERENCE

To be successful, dealerships need to leverage the diversity of their workforce to improve the quality of decision making, fuel growth and inspire the next generation. This unique event brings together women professionals in the equipment industry to network and provide an opportunity to enhance their leadership skills and discuss the unique challenges they face.

AED's Women in Equipment Conference event focuses on helping women leaders understand their unique strengths as well as barriers to success, grow their leadership skills, interact with other women professionals from allied industries to grow their network, and increase visibility of women in the industry.



“The value in this event for me, is support. Truly being able to see so many women coming together to be a great support for each other and be vulnerable and to talk about things together, was just so empowering.”

Alexandra Norris, Specialty Equipment Insurance Services

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LEADERSHIP DEVELOPMENT INSTITUTE

The **AED Leadership Development Institute (LDI)** is a program for high-potential managers who are expected to prepare for broader organizational roles. LDI is the only industry-specific leadership program in the market today that takes participants out of their individual silo and encourages them to focus on the business as a whole.

Developed based on feedback from both distributors and manufacturers, LDI is designed to prepare the next generation of dealership leaders for upcoming roles in their dealership. This comprehensive program covers content in both the operational areas of a dealership as well as personal leadership development. Attendees will work with an executive coach to develop a capstone project that delivers real ROI to the sponsoring dealership.

Three Educational Sessions

*Last year's participants generated an average annual net income impact of over **\$540,000** for their dealerships*

PROGRAM HIGHLIGHTS

- Cohort learning experience with interactive workshops facilitated by respected industry experts and executive development professionals
- Content focused on both functional/technical know-how and core leadership skills with industry-relevant case studies, role plays, and application projects
- AED Leadership Excellence 360 Feedback (LEX-360), a customized assessment with feedback from the people who know you best: your manager, your peers, and your subordinates
- Recorded webinars to watch between live sessions that enhance and support participant learning
- Key synergies across sales, service, parts, rental, finance, and administration



Coaching

Each participant has the opportunity to work with a leadership coach throughout the LDI program. The coach assists participants with understanding their LEX-360 results and integrating the in-person topics into their daily roles.

In addition, the coach is available to troubleshoot issues and provide support as participants develop their capstone projects.

Capstone Project

The capstone project is a key feature of LDI in which participants conduct a review of their respective dealerships and identify areas for improvement.

Participants work on their capstone projects throughout the program and present their final project at the last session, showing how they've applied their knowledge and capabilities to generate business improvements in the dealership.

MANAGEMENT DEVELOPMENT SEMINARS

How prepared are your managers for leading their department, growing sales and profitability, and having the right connections to successfully take on their challenges?

The AED Foundation's Management Development Seminar Series is your solution for achieving those results. Consider enrolling in any of these day and a half, instructor-led seminars, and you'll experience great networking content catered to your needs and an action plan to take back to the dealership. Interested in AED bringing these programs to your business exclusively? Contact your regional manager for more information on hosting an on-site program.

Are you looking for a seminar to help you hone your skills and bring your department to the next level?

The AED Foundation has just what you're looking for! See our list of educational opportunities below to find the seminar for you and register at bit.ly/2025AEDEvents

BASIC PARTS MANAGEMENT SEMINAR

Are you new to a leadership role in your dealership's parts department? After learning how to assess your performance, do you want to learn practical tactics for improving not only your numbers, but your own personal performance as well? Then attend this one and a half day program, which will cover the fundamental skills needed to effectively run your dealership's parts department. Leave with practical plans to implement and continue your progression to the advanced parts seminar in six months.

Content Includes:

■ *The Role of a Parts Manager*

- Basics of finance for parts managers
- Determining your departmental financial goals
- Understanding key performance indicators (KPIs)
- Assessing your departmental processes and procedures
- Inventory strategies that maximize customer satisfaction within your financial constraints

■ *Becoming the Leader of Your Parts Department*

- How to effectively recruit, hire and on-board new employees
- Operational training tools to enhance the learning process
- How to effectively communicate performance expectations and goals

■ *Growing Sales and Profitability*

- Inventory strategies that maximize customer satisfaction within your financial constraints
- Operational approaches to serving internal and external customers
- Marketing programs and techniques that work
- How the parts department supports the rest of your dealership
- Staffing for exceptional service with financial responsibility



MANAGEMENT DEVELOPMENT SEMINARS

BASIC SERVICE MANAGEMENT SEMINAR

Are you new to a leadership role in your dealership's service department? After learning how to assess your performance, do you want to learn practical tactics for improving not only your numbers, but your own personal performance as well?

Attend this one and a half day program, which will cover the fundamental skills needed to effectively run your dealership's service department. Attendees will develop personal action plans to take back to their dealerships. This course balances management strategy with down-to-earth tactics that you can implement in your dealership. Leave with practical plans to implement and continue your progression to the advanced service seminar in six months.



Content Includes:

■ *The Role of a Service Manager*

- Basics of finance for service managers
- Determining your departmental financial goals
- Understanding key performance indicators (KPIs)
- Assessing your departmental processes and procedures
- Scheduling tactics to minimize wasted time and maximize hours billed

■ *Becoming the Leader of Your Service Department*

- How to effectively recruit, hire and on-board new technicians
- Operational training techniques to enhance the learning process
- How to effectively communicate performance expectations and goals

■ *Growing Sales and Profitability*

- Pricing techniques and standard charge billing
- Marketing programs and techniques that work
- Managing warranty as a customer acquisition strategy
- How the service department supports the rest of your dealership
- Staffing for exceptional service with financial responsibility



The entire seminar was a great experience. Everything that was covered was new and a great help for my role.

JOSE GUERRERO, Quinn Company

MANAGEMENT DEVELOPMENT SEMINARS

BASIC RENTAL MANAGEMENT SEMINAR

This seminar is for attendees who are newer to the rental department or whose company has a relatively small rental fleet (under 50 units). The focus of this seminar is for the attendees to understand the rapid evolution of the rental market, what are the drivers behind it, and what it takes to compete successfully.

Content Includes:

- Understanding the difference between rent-to-sell and rent-to-rent and why your dealership most likely needs both
- Identifying what customers have come to expect and how to find your position in the competitive rental market
- Gaining a deeper understanding of the operational processes involved in a rental transaction
- Recognizing the profitability impact of a well-designed, efficiently operated rental fleet and how it can boost profits for your dealership
- Understanding that all machines don't yield the same amount of profit and it requires experience to develop a profitable blend of machines in your fleet



BASIC SALES MANAGEMENT SEMINAR

Becoming a sales manager takes more than being a successful individual contributor. The “basics” of sales are ever-changing, and we must always be open-minded and willing to revisit, refresh, and reset our sales skills to meet the needs of how people buy – or you get left behind. Whether your goal is to progress to managing people or you want to sharpen your skills in selling, this workshop is an excellent opportunity to develop a new understanding of the mindset and behaviors required to transition to sales management successfully. This industry is changing, and this exciting and interactive seminar directly addresses the changes and challenges needed to ensure a thriving future.

Every attendee will be equipped with new tools and mindset to improve the customer experience.

This 1 ½ day seminar, led by Todd Cohen, is designed for the sales professional (individual contributor) who has been in their role a minimum of 2-3 years. Attendees will learn through an exciting mix of hands-on, lecture, and role-play exercises.

Content Includes:

- Sales: What's different today? Why business as usual won't work!
- Why sales are mindset and behavior as much as skills
- How sales culture elevates you and your organization
- Don't waste your time: your ideal client
- Research, connect, AND CREATE sustainable relationships
- Nailing the delivery: effective and profitable presentation skills
- The “myth of rejection” and overcoming objections and obstacles!
- Keeping your momentum: closing and follow-up skills
- Efficient territory and time management
- Profitable networking skills to stay memorable



MANAGEMENT DEVELOPMENT SEMINARS

ADVANCED PARTS MANAGEMENT SEMINAR

This seminar is a next step for new parts managers to progress from the basic seminar. It will allow experienced professionals to home in on the skill sets needed to take their parts department to the next level. Combining the basics of financial management for profitability with new concepts of customer relationship management, emotional intelligence and critical thinking techniques, this seminar will provide attendees with strategies and practical tactics that can be implemented immediately to increase the performance of your department.

Content Includes:

- Six major challenges of a parts manager
- Role of a parts manager
- Understanding basic financials and the parts department as a profit center
- Advanced parts key performance indicators (KPIs)
- Advanced parts processes and exercises to show how they affect performances
- Using critical thinking techniques in problem-solving
- The customer servicing process – WOW your customers and turn them into your fans
- Using your advanced marketing tools such as a CRM to sell more and increase customer retention
- Using emotional intelligence to become the boss your employees want to work for
- Employee development, including hiring, onboarding, motivating, coaching and developing their action plans for growth and performance



ADVANCED SERVICE MANAGEMENT SEMINAR

This seminar, similar to parts above, will allow experienced professionals to home in on the skill sets needed to take their service department to the next level. Combining the basics of financial management for profitability with new concepts of customer relationship management, emotional intelligence and critical thinking techniques, this seminar will provide attendees with strategies and practical tactics that can be implemented immediately in the service department.

Content Includes:

- Having an intelligent service labor sales strategy, including wage multiple and time production in the shop
- Understanding the importance of selling maintenance programs
- Using standard charging techniques to increase sales and satisfy customers
- Advanced service key performance indicators (KPIs)
- Dispute and problem resolution techniques
- Advanced time management techniques
- Using critical thinking techniques in problem-solving
- The customer servicing process – WOW your customers and turn them into your fans
- Using your advanced marketing tools such as a CRM to sell more and increase customer retention
- Using emotional intelligence to become the boss your employees want to work for
- Employee development, including hiring, onboarding, motivating, coaching and developing their action plans for growth and performance



MANAGEMENT DEVELOPMENT SEMINARS

ADVANCED RENTAL MANAGEMENT SEMINAR

This seminar is for attendees who have a minimum of three to five years' experience working in rental and have most of the basic understanding required to function effectively in the rental department. Their company's rental fleet has generally more than 50 units and are feeling market pressures to grow the rental department.

The focus for this seminar is making rental more of a strategic initiative rather than a reactive one. This includes aligning resources within the company to not only grow the fleet, but efficiently run the operations and increase fleet utilization which drives revenue and gross profit margin.

Content Includes:

- Gaining an understanding of operational benchmarks for rental fleets as we review the latest AED Cost of Doing Business Survey
- Focusing on the top ten reasons why most dealer rental fleets are underperforming
- Ensuring that you are measuring the right thing; fleet management is a very dynamic task and requires accurate and timely information
- Reviewing the KPI's that you should be monitoring to make good decisions
- Examining a few different scenarios to see if you are holding machines too long or possibly selling off too soon
- Reviewing a number of technology plays that could greatly benefit your fleet management efforts, improve the customer experience and result in greater margins



FOR ADDITIONAL EVENT
AND UPDATED
INFORMATION VISIT
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There are lots of things that I can implement right away at my dealership to improve my results.

MIKE BROWN, *Equipment Corporation of America*

MANAGEMENT DEVELOPMENT SEMINARS

BRANCH / STORE MANAGEMENT SEMINAR

As the leader for your branch or store, you are responsible for people, assets, business relationships and profitability. This seminar is designed to address all the skill sets, processes, techniques and the time management skills needed to become a top performing branch/store manager. This program will reset your perspective and provide you with ideas, suggestions and tools to become an effective leader of people who drive the mission of creating and keeping more customers while making money doing it.

Attendees will also learn how to use new critical thinking techniques, emotional intelligence and target marketing to drive performance. Learn how to set better goals across departments, manage challenging situations with team members and customers, and assess the operational efficiency of your branch or store.



CONTENT INCLUDES:

■ *Financial Responsibilities*

- Delivering an expected rate of return to the business owner
- Managing the assets of the organization
- Protecting the organization's data, including customer lists, customer purchase history and any data with financial value, especially to a potential competitor
- Establishing departmental goals and budgets
- Choosing key performance indicators (KPIs)

■ *Market Responsibilities*

- Understanding all market opportunities
- Establishing & growing all market positions
- Growing customer satisfaction and your customer base
- Determining revenue potential for all departments - whole goods, parts, service, and rental
- Determining market participation and closing success
- Establishing market share and customer retention goals

■ *People Responsibilities*

- Providing a clean, safe, productive and fun work environment
- Using emotional intelligence to become the boss that people want to work for
- Properly staffing your dealership
- Attracting top talent
- Understanding generational differences
- Providing a path for growth for your employees and yourself

CERTIFIED MANAGER PROGRAMS

Raise the Bar on Management Performance with The AED Foundation's Certified Manager Programs

DID YOU KNOW?

The AED Foundation's Certified Manager Programs offer a blended curriculum of leadership and operational coursework to give managers the tools they need to succeed. Each program offers certification candidates the opportunity to complete learning requirements via web-based self-study courses that employees can complete on their own time and at their own pace.

The AED Foundation Certified Managers are part of an exclusive class of professionals who have met the rigorous certification standards set forth by AED and The AED Foundation. Achieving management certification signifies a commitment to superior workplace performance on the part of AED member companies and their individual team members.

CERTIFIED MANAGER PROGRAMS INCLUDE:

- Certified Parts Manager
- Certified Service Manager
- Certified Rental Manager
- Certified Sales Manager
- Certified Branch/Store Manager

PROGRAM PRICING INFORMATION:

Become certified today! The Certified Manager Programs are \$2,995 and include all courses and the final certification test.



**Don't just take our word
for it, hear directly from
your industry peers!**

"No other training will give you the assurance that you and your team understand what the core issues are, what can be done to fix those issues, and how a fix may affect other portions of the dealership. There is no other training available for dealers quite like it."

BRUCE TAYLOR
Branch Manager

"I enjoyed the certified manager program so much that when the service block was complete, I went ahead and completed all the other courses as well; parts, rental, and service. I even started the branch manager courses. I would highly recommend the AED programs to anyone who's interested in becoming a better manager, it's worthwhile."

KELLY SHUFFIELD
General Service Manager,
Crane Division

**For more information on
The AED Foundation's
Management Certification
Programs, CONTACT:**

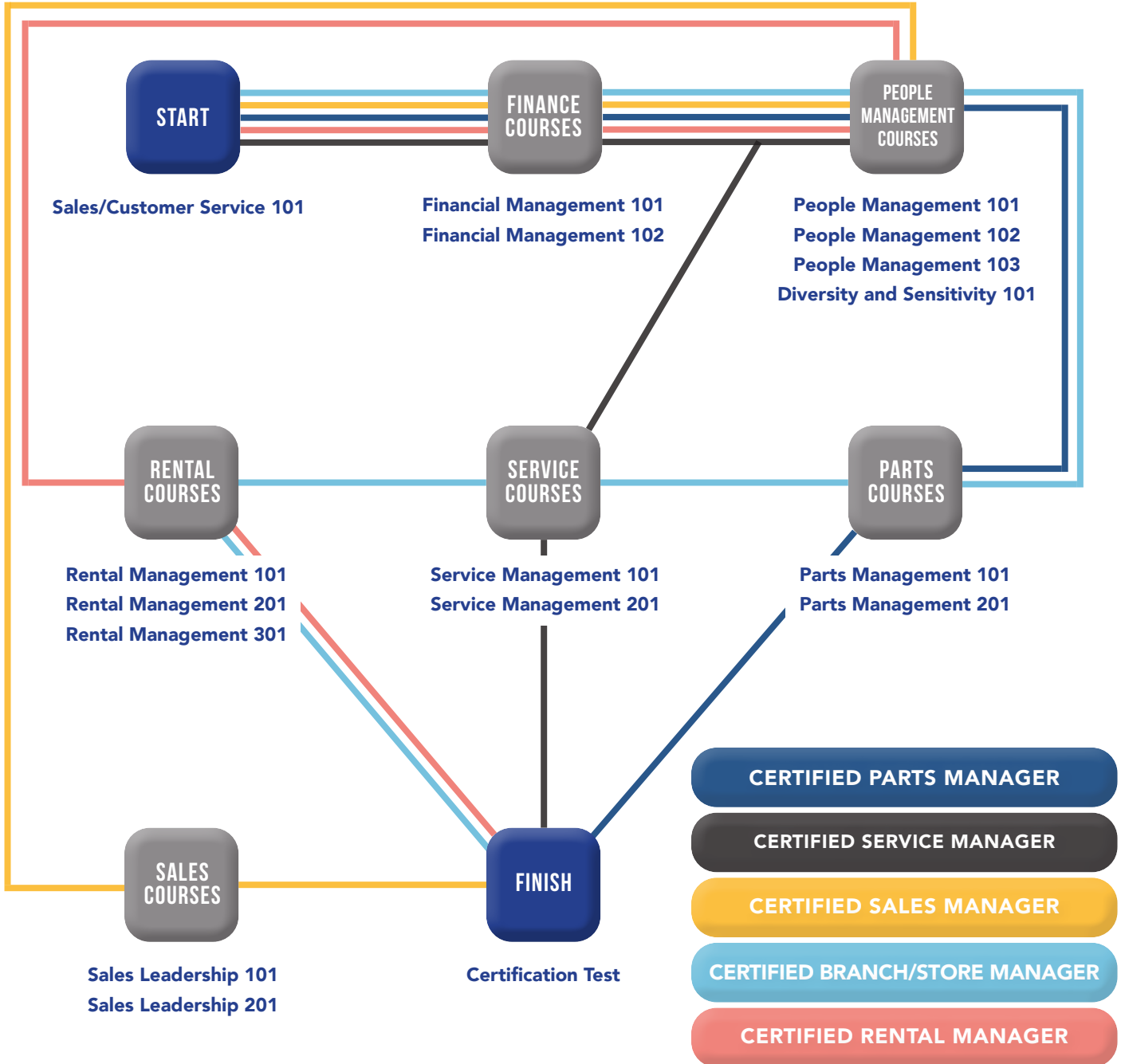
KATRINA WATKINS • Program Coordinator

630-468-1248

kwatkins@aednet.org

CERTIFIED MANAGER ROADMAP

Below is a visual map of the routes you can take to become a certified manager.
Notice the overlap of courses for each title.



For more information
on The AED Foundation's
Certified Manager
Programs, CONTACT:

KATRINA WATKINS • Program Coordinator

📞 630-468-1248

✉️ kwatkins@aednet.org

DIVERSITY & INCLUSION

101

Course Description

Diversity & Sensitivity 101 discusses how diversity makes a positive impact on your dealership's culture and the importance of being aware of unconscious biases. It reviews the benefits and challenges of workplace diversity, cultural competence, stereotypes and unconscious bias, as well as a brief overview of current anti-discrimination laws that all managers should be aware of.

Content Includes:

- Understanding the importance of diversity
- Understanding how you benefit from diversity, inclusion, and cultural awareness
- Analyzing ways to positively impact your organization's culture by understanding bias and inclusion
- Comprehending the legal framework for bias and discrimination

FINANCIAL MANAGEMENT

101

Course Description

Introduction to Business Finance for Non-Financial Managers is a course designed to help you harness the power of accounting by teaching you the fundamental elements of accounting and business finance. The course will also teach you how to read, interpret and understand the three major financial statements a dealership uses to tell its story: the balance sheet, income statement and cash flow statement.

Content Includes:

- Interpreting and comprehending the three major financial statements commonly employed by AED member companies: the balance sheet, income statement and cash flow statement
- Understanding the basic principles and processes of business accountancy and finance
- Using the balance sheet, income statement and cash flow statement to actively inform activity and productivity goals and measure to the extent appropriate to your position within the dealership
- Using the balance sheet, income statement and cash flow statement to form conclusions, ideas and hypotheses about the financial state of the dealership

102

Course Description

Ratio Analysis for Non-Financial Managers is an online course designed to help you calculate and interpret the financial ratios most commonly used in the equipment distribution industry. Ratio analysis enables you to spot industry trends and compare your company's performance with the average performance of similar dealerships in the heavy equipment industry.

Content Includes:

- An introduction to ratio analysis
- Understanding the path of the dollar through the dealership to ensure professional competency
- Reading and interpreting financial statements to make management decisions
- Establishing a strong foundation of business acumen and core financial knowledge

PEOPLE MANAGEMENT

101

Course Description

This course focuses on the importance and challenges of strategy execution, business culture and values, accountability and employee engagement. It introduces a new High Performance Model that includes strategy, organizational culture processes, accountability, employee engagement and achieving results.

Content Includes:

- Examining common communication challenges
- Identifying and mitigating the major barriers to change
- Learning how leaders embed culture in their organizations
- Learning the key signs of accountability avoidance
- Identifying what employee engagement looks and sounds like

102

Course Description

This course focuses on the importance and challenges of aligning resources (time, money and talent). It specifically examines aligning a people strategy (the plan); key organizational culture processes (OCPs) that inform, teach and reinforce; and individual and team behavior. It also addresses critical legal considerations that must be taken into account.

Content Includes:

- Understanding the importance of a people strategy and the five key “musts” it should address
- How to apply two alignment models to your dealership’s strategy – the 4-Step Coaching Model and the Leader’s Time Allocation Model
- Identifying what employee engagement looks and sounds like
- How to increase clarity in values-based behaviors

103

Course Description

This course focuses on championing results. It examines four key elements, including self-assessment and awareness, competency trends, creating a motivating workplace, and practical techniques to champion results.

Content Includes:

- Understanding the benefits of personal self-assessment
- Applying multiple techniques to validate strengths and weaknesses
- Comparing current motivation practices against best practice research
- Examining and addressing the actions that hurt and unmotivate people
- Reviewing, comparing and adjusting your actions and behaviors to maximize eight key drivers for engaging high performance

PARTS MANAGEMENT

101

Course Description

The purpose of this course is to provide new managers with the fundamentals needed to become a highly effective parts manager. This course is also useful for people with some managerial experience, especially if they have had no prior experience in parts management or if this is their first time managing in a dealership. Management is key to a dealership, and there is plenty of room for individuals to develop their own style of working with others.

Content Includes:

- How a dealership needs to be a balanced organization with the parts department as a key part of that organization
- Basic financial terminology used in the parts department, and how to use it in managing your performance
- The sales aspects of your department and the role that customer satisfaction plays
- How to get things done through effective action plans, goals and employee coaching within the dealership
- Using the balance sheet, income statement and cash flow statement to form conclusions, ideas and hypotheses about the financial state of the dealership

201

Course Description

This program will build upon the concepts introduced in the Parts Management 101 course, as well as introduce new tools and best practices. This course will focus on understanding the importance of changing current parts processes and the resulting positive impact this will have on the parts department and total dealership productivity, effectiveness and profitability.

Content Includes:

- Understanding how to increase productivity and how to affect KPIs such as gross margin, sales mix, return on assets, turnover, and sales growth
- The importance of empowering parts department employees and coaching them to maintain all key processes
- Understanding basic principles of teamwork and partnership to deliver solid customer retention
- The customer relations process and how the entire parts staff must focus on the execution of the process, including communication skills, follow-up, motivation and reward
- The importance of good parts processes to maintain significant inventory and decrease the chances of losing profits in lost discounts, weak margins, high freight costs and obsolete inventory

FOR ADDITIONAL EVENT AND
UPDATED INFORMATION VISIT
bit.ly/2025AEDEvents

RENTAL MANAGEMENT

101

Course Description

The largest rental companies in the industry are now international, and rental has grown to the point where some of the leaders are publicly traded. This is a capital-intensive business. This course will focus on a baseline understanding of how the rental industry has evolved over the last 50 years into a powerful delivery channel and the factors necessary for a dealer to compete in this space.

Content Includes:

- Understanding of the rental industry and its increasing penetration into daily commercial construction and industrial projects
- Market share as a strong indicator of future parts and service revenues, the real profit centers for most dealerships
- Rental as a foundational part of the growth of your dealership and a means to grow market share

201

Course Description

This course provides a more detailed understanding of the activities within a rental department that influence profitability.

Content Includes:

- Having the right people in the right positions, and having them properly trained and knowledgeable about the machines in the rental fleet
- Putting the right processes in place to create efficient workflow and allow maximum time utilization
- The importance of a fleet mix of machines that will be perceived by customers as a reliable source with enough options for their needs

301

Course Description

The aim of this course is to gain the knowledge and understanding that is required as a rental manager. There are many parts to this job that require understanding and focus to achieve profitable results. Although it may seem that the rental manager's job is to keep the customer happy, in reality, this job is much broader and more complex.

Content Includes:

- Using industry benchmarks to give you a broader awareness of how your fleet investment is performing compared to others in the same industry
- The people skills needed for effective daily operations of the department
- The business management and critical thinking skills required to effectively manage an investment portfolio of machines
- Understanding the key performance indicators (KPIs) used to monitor your investment, rather than relying on rental revenues

SALES LEADERSHIP

101

Course Description

This self-study course is designed for new and seasoned sales leaders. It covers vital areas that all sales leaders must embrace and master to elevate their skills, improve sales team productivity and motivate individual contributors to be better sales professionals. This course introduces skills that transcend the nuts and bolts of sales management by focusing on creating a sales culture and ecosystem that produces long term revenue and profitability. It will create an inspiring mindset that drives positive behaviors and sets the sales leader up for long-term success.

Content Includes:

- Establishing presence
- Salesforce onboarding
- Active and passive recruiting
- Being the bridge between the sales team and management
- Forecasting
- Creating sales & revenue reports
- Evaluating and modifying the sales process

201

Course Description

This self-study course is an exciting learning experience designed for sales leaders and all people managers. It creates a new perspective on coaching that makes it a part of every conversation and interaction. Every conversation is a coaching moment. There is a difference between encouraging someone's performance and behavior and telling someone to do something to achieve a desired result. When you can help someone by coaching, do you respond by telling them or coaching them? Coaching is a selling skill and great coaches take their sales teams to new and exciting levels of performance. This course introduces the skills and traits of how to be an effective and successful coach to your team.

Content Includes:

- Coaching vs. telling vs. mentoring
- Setting the stage for successful coaching
- Self esteem and coaching for the future
- Validating for mutual understanding, responsibility, and desired outcomes
- Creating opportunities for success & handling objections
- Creating a call to action and plan to ensure accountability
- Recognition

SALES/CUSTOMER SERVICE

101

Course Description

This course is designed to help you locate, identify and retain a profitable customer base by teaching you the fundamental elements of marketing, sales and customer service. As a manager, you have goals and expectations for yourself and for your team, and your executive team has goals and expectations for you. Understanding essential marketing, sales and customer service practices will help you to play a major role in the profitability of your dealership. The knowledge of best marketing practices along with the ability to retain customers through effective service practices

will enable you to become a valuable asset to your department, your branch and your dealership.

Content Includes:

- An introduction to marketing
- Understanding the connection between customer loyalty and sales productivity
- An overview of the behavioral skills that build strong customer relationships
- Real-life best practices provided by your industry peers to help you put your new knowledge and skills into practice

SERVICE MANAGEMENT

101

Course Description

The purpose of this course is to provide new managers with the fundamentals needed to become a highly effective service manager. This course is also useful for people with some managerial experience, especially if they have had no formal education in service management or if this is their first time managing in a dealership. Management is key to a dealership, and there is plenty of room for individuals to grow their own style of working with others.

Content Includes:

- How a dealership needs to be a balanced organization with the service department as a key part of that organization
- The sales aspect of your department and the role that customer satisfaction plays
- How to get things done through effective action plans, goals and employee coaching
- Basic financial terminology used in the service department, and how to use it in managing your performance
- The concepts of wage multiple and shop productivity, and how these affect your profitability and ability to attract and retain good technicians

201

Course Description

This course will build upon the concepts introduced in the Service Management 101 course, as well as introduce new tools and best practices. This course will focus on the importance of changing current service processes and the resulting positive impact this will have on the service department and total dealership productivity, effectiveness and profitability.

Content Includes:

- Technician time management and the fundamental formula for service gross profit
- Service department operations that will increase service sales, improve quality, streamline processes and generate net profit that exceeds 25 percent, which is the highest for the dealership
- Understanding how to increase productivity and how to affect KPIs such as billing efficiency, work in process and expense control by category
- The service customer relations process and how the entire service staff must focus on the execution of the process, including communication skills, follow-up, motivation and reward
- The importance of empowering service department employees and coaching them to maintain all key processes
- Understanding basic principles of teamwork, partnership and consultative selling to deliver solid customer retention

ONLINE TECHNICAL COURSES

Make sure your entire staff knows equipment inside and out with our new course offerings in our online curriculum.

Who are these courses for? These courses give employers the assurance that their entire dealership staff will succeed in customer-facing interactions. Likewise, employees will gain confidence in making sales, conversing with industry professionals, and growing their competence in equipment.

How long do they take? These courses are designed to fit into your busy schedule. They are efficient and self-paced, yet the entire bundle digs deep. Most can be completed in under an hour. Take just one to get immediate benefits or take them all and outshine your competition!

How technical are they? They won't teach you how to replace a hydraulic filter, for example, but they will teach you the difference between a hydraulic pump and hydraulic motor, as well as the safety precautions of working with hydraulic systems. The program covers content in all six core competencies outlined in the *Standards for Equipment Technology*, including key concepts in safety, electronics, and engines. When you pay for the bundle, you get everything for one year.


How much? Less than \$20 per course!! The entire bundle of courses is \$499/person and gets you an entire year of on-demand access. As soon as your sales associate explains a countershaft transmission to a customer, it'll pay for itself.

Current Course List

- Shop Safety
- Basic Hand Tools
- Precision Measuring Tools
- Electric Tool Fundamentals
- Air Tool Fundamentals
- Hydraulic Tool Fundamentals
- Lifting Equipment Fundamentals
- Cleaning Equipment Fundamentals
- Fundamentals of Electrical Safety
- Electrical Schematics
- Basic Electrical I
- Basic Electrical II
- Basic Electrical III
- Hydraulic Schematics
- Basic Hydraulics I
- Basic Hydraulics II
- Basic Hydraulics III
- Transmission Fundamentals
- Countershaft Transmissions
- Planetary Transmissions
- Gear Fundamentals
- Differential and Axle Fundamentals
- Clutch and Brake Steering Systems
- Torque Converter Fundamentals
- Diesel Engine Fundamentals
- Tier 4 Emissions
- HVAC Fundamentals

For more information on the online technical course program, CONTACT:

KATRINA WATKINS • Program Coordinator

 630-468-1248

 kwatkins@aednet.org

THE AED FOUNDATION TECHNICAL ASSESSMENT & INDUSTRY CERTIFIED TECHNICIAN

What Is The AED Foundation Technical Assessment & Industry Technician Certification?

The AED Foundation Technical Assessments evaluate technicians' knowledge of the critical functions outlined in *The Standards for Equipment Technology* published by The AED Foundation. The questions as well as the standards that they are based on were developed by a task force of technical experts from across the industry, including manufacturers, distributors, and educators.

Who Takes The AED Foundation Technical Assessment?

The assessment is designed as a tool for employers; it can be used as a pre-hire tool to assess the technical knowledge of a prospective hire and/or to evaluate current technicians. It is an online-based assessment that can be administered by the employer.

THE VALUE OF THE AED FOUNDATION TECHNICAL ASSESSMENT AND INDUSTRY CERTIFIED TECHNICIANS

PRE-HIRE

Cost Savings

Make the right hire the first time!
Organizations that use the Assessment can avoid hiring a technician that does not have the technical knowledge to meet customer needs, saving valuable time and money.

Increase Productivity

Using the Assessment can aid the hiring manager in knowing where the technician stands on day-one. This allows the organization to identify areas where additional technical education may be needed. The faster a technician is performing to the organization's metrics, the faster they can impact the bottom line.

CURRENT EMPLOYEES

Customer Satisfaction

Uptime matters! Assessing technicians demonstrates to customers that the organization is dedicated to developing a highly skilled workforce capable of fast and efficient repairs.

Industry Certification

Technicians can earn an industry recognized certification if they score above 70%. This demonstrates to employees the organization's commitment to development and recognition and can increase retention.

THE AED FOUNDATION TECHNICAL ASSESSMENT & INDUSTRY CERTIFIED TECHNICIAN

ASSESSMENTS

BY THE NUMBERS



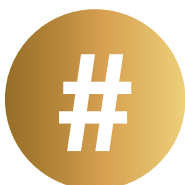
TIME LIMIT

180 minutes



PRICE

\$100



NUMBER OF TESTS ADMINISTERED

Over 1,500 tests administered



NUMBER OF QUESTIONS

160



DO YOUR TECHNICIANS MAKE THE GRADE?

The AED Foundation's Assessment provides data to benchmark your technicians against the industry.



To learn more on The AED Foundation Technical Assessment & Industry Certified Technicians

- **Scan** the QR code
- **Visit** aedfoundation.org
- **Contact** Katrina Watkins at kwatkins@aednet.org



WEBINARS | ON DEMAND WEBINARS

The AED Foundation has a catalog of webinars featured within our Learning Management System. Browse the online catalog to find hour-long educational sessions for any department within your company.

- Are You Truly Wowing Your Customers?
- Are Your Exempt Employees Really Exempt? What the New DOL Overtime Rule Means for Your Company
- Attracting Talented Candidates with Career Opportunities
- Best Practices for Employee Termination
- Beyond Satisfaction Surveys
- Building Your Product Support Marketing Plan
- Creating an Effective E-Commerce Program in Your Parts Department
- Customer Service: Standing Out from the Crowd
- Dealer Tax Opportunities
- Determining the Right Size Rental Fleet for You
- Determining Your Parts & Service Revenue Potential and Market Share
- Developing Your Exit Strategy
- Disciplining for Results
- Double Your Productivity: Organize and Get Control of Your Time and Your Life
- Establishing an Effective Parts and Service Department Program (French)
- Establishing an Effective Parts and Service Department Program (English)
- Everyone in the Dealership Sells! Maximizing Every Precious Interaction
- Everyone's in Sales — Building a Sales Culture!
- Gearing Up to Sell Maintenance Agreements, Inspection Programs, and Service Intervals
- Getting Serious About Dealing with Surplus and Obsolete Inventory
- How to Attract Quality Technicians and Parts Counter Employees
- How to Avoid the Pitfalls of Running a Family Owned Business
- How to Build a True Team Within Your Dealership
- How to Fast-Track Entry-Level Technicians
- I Wish Someone Would Communicate Around Here
- If You Don't Protect Your Equipment, Who Will?
- Is Your Service Department Designed for Peak Performance? (English)
- Is Your Service Department Designed for Peak Performance? (French)
- Learning to Love Your Rental Department
- Machine Salesman/Rental Salesman — Can They be the Same?
- Mobile Resource Management
- Onboarding for New Techs
- Online Marketing — Where It's Going; How to Win
- Rental Fleet Financial Management
- Rental Fleet Internal Charges/What's Fair?
- Sales Professional Negotiation
- Satisfying Multiple Customers
- Secrets to Legendary Service on the Job Site
- Selling Rental: More Involved Than You Think
- Setting Rental Rates — Science or Art?
- Setting Up Your Business With Social Media Assets
- Six Regimens That Are Vital for Construction Equipment Sales Professionals
- Taxes and Your Rental Business
- The Art of the Deal: Buying, Selling and Valuing Your Equipment Dealership in Today's Market
- The Maintenance of Maintaining Your Rental Fleet
- Two Birds: One Stone
- Understanding AED's Cost of Doing Rental Fleet
- Understanding Damage Waivers
- Understanding Your People Strategy
- Vital Planning Disciplines for Sales Professionals
- Electronic Logging Device (ELD) Compliance
- Why Do We Sometimes SEE Things So Differently Understanding and Maximizing Team Dynamics
- Working with Upset Customers
- Your Surplus Inventory Is On Fire!

ADVOCACY

AED is the voice of equipment dealers in Washington D.C., Ottawa and in state and provincial capitals. The association pursues a robust policy agenda that prioritizes the following:

- Pro-Growth Tax Policies
- Oppose Right to Repair Mandates
- Commonsense, Balanced Regulations
- Removing Obstacles to Free Trade
- Infrastructure Investment
- Provide Career Pathways Through Apprenticeships, CTE & Vocational Schools
- Support Rural Communities & the Agriculture Sector
- Facilitate Natural Resources Development



LEGISLATIVE VISIT PROGRAM

AED has a robust congressional, parliamentary, state legislator, and provincial parliamentary facility visit program designed to introduce and educate lawmakers and candidates regarding policy issues important to equipment dealers and the industry's positive impact in local communities.

Visits last about an hour and involve a meeting with dealership executives, followed by a tour of the facility. AED handles the scheduling, and an AED staff member will attend the meeting to ensure that it goes smoothly.



Contact AED's Government Affairs Manager, **Jonathon Porter** (jporter@aednet.org) to learn more and to schedule your legislative visit today!



STAY UP TO DATE

AED produces the D.C. Debrief, Ottawa Policy Brief, the State Legislative Newsletter and regular webinars, alerts and communications to ensure AED members receive the most current information about policies that impact the equipment industry and broader business community. Additionally, the AED Policy Conference & Advocacy Day, the Ottawa Parliament Hill Day, and the state and provincial Fly-Ins are a great opportunity for AED members to get involved, make a difference and gain valuable insights about the policy and political landscape.



AED PAC

AED PAC is a federal political committee funded by personal contributions from U.S.-based AED members. The funds are used to support the campaigns of federal candidates that prioritize AED's pro-growth policy agenda. In addition to helping to elect lawmakers that advocate for the equipment industry, AED PAC helps increase AED's visibility on Capitol Hill and ensures the association has a seat at the table as key legislation is being drafted and considered.

To learn more about AED PAC contact AED's Senior Vice President of Government & External Affairs **Daniel B. Fisher (dfisher@aednet.org)**.



POLITICAL ACTION COMMITTEE

In 2024, AED PAC distributed, on a bipartisan basis, more than **\$150,000** to candidates that support AED's pro-growth policy agenda

THE AED FOUNDATION'S VISION CAMPAIGN

Building a Stronger Future for the Equipment Distribution Industry

The current skills gap and workforce shortage are hurting the profitability and threatening the future of manufacturers, affiliates, and equipment distributors. This challenge is only expected to grow, and it is far too big for members to solve independently.

Given The AED Foundation's successful track record, together as an industry we can build a pipeline of qualified equipment technicians through a proven network of programs while maintaining the highest levels of industry standards.



■ Vision is The AED Foundation's bold initiative to address the technician shortage and strengthen the future of the equipment distribution industry by growing our impact upon schools, students, and the industry to include:

- A minimum of 100 accredited college programs (120 by 2027)
- A minimum of 150 recognized high school programs (200 by 2027)

By hitting these benchmarks, the Vision Campaign will create a steady and strong pipeline of talent that includes an estimated additional:

- 10,000 skilled technicians entering the workforce
- 5,000 AED Foundation certified technicians

THE VISION CAMPAIGN GOAL IS TO RAISE A MINIMUM OF **\$10 MILLION** BY 2027 TO ACCOMPLISH THESE GOALS.



WE NEED YOUR SUPPORT!

With your support, Vision will be the beginning of transforming workforce development for the entire industry.

Visit [AEDFoundation.org](https://www.aedfoundation.org) to view the Vision brochure and to learn more about the latest Foundation updates or contact

Tarah McShane at tmcshane@aednet.org or 630-642-9108.

THE AED FOUNDATION'S ANNUAL FUNDRAISING CAMPAIGN

The AED Foundation's (AEDF) Annual Campaign begins during the fall each year. The campaign is the Foundation's main source of funding that goes towards addressing the equipment's industry's profitability.



Funds raised are critical to ensuring the Foundation can continue expanding its industry efforts in the three below key focus areas:



Accreditation: The AED Foundation accredits postsecondary equipment technology programs and recognizes high school programs, ensuring a sustainable pipeline of qualified technicians.



Career Promotion: The AED Foundation actively promotes rewarding career opportunities available in the equipment distribution industry. The AED Foundation programs offer not just job training but long-term career pathways and continuing education. To effectively address the technician shortage and the industry's image, it is important to continuously build industry awareness among students, parents, educators, and other stakeholders.



Research: The AED Foundation is the leading organization funding industry-specific research to advance the importance of workforce development. This data is shared with legislators, educators, the media, and other stakeholders. Research is critical because it helps quantify the challenges the equipment distribution industry faces and allows The AED Foundation to leverage the industry's influence to drive meaningful change and track emerging trends.

YOUR SUPPORT MATTERS!

To learn more about the Annual Campaign, to view the brochure, or to contribute today, please visit: AEDFoundation.org/annual-campaign or contact Tarah McShane at tmcshane@aednet.org or 630-642-9108.

THE AED FOUNDATION'S RESEARCH

Leveraging Data to Tackle Industry Challenges

The AED Foundation is the leading organization funding industry-specific research in order to advance the importance of workforce development and it shares that data with legislators, educators, the media and other stakeholders.



Research is a critical component of The AED Foundation's mission because:

- It helps quantify the challenges the equipment industry faces and allows it to leverage the power of the industry to drive meaningful change.
- It allows The AED Foundation to track emerging trends and grow the industry as a whole.
- It backs up our claims when we advocate for greater investment in career and technical education in the United States and Canada.



Past reports have delved into the impact of the technician shortage on the U.S. economy, utilizing foreign born talent to address the technician shortage, the causes of the technician shortage, industry sentiment reports and more!

The AED Foundation looks forward to continuing to commission timely research reports to help AED members best prepare for a changing industry landscape in the future.

ALL OF THE AED FOUNDATION'S COMMISSIONED RESEARCH REPORTS ARE ACCESSIBLE AT

<https://aednet.org/industry-insight-news/industry-reports>

THE AED FOUNDATION'S KNAPHEIDE TECHNICIANS OF THE YEAR AWARD

The **AED Foundation's Knapheide Technicians of the Year Award** is presented annually to technicians to recognize the best of the best in the technician field. This award recognizes the hard-working technicians who are critical to the success of the equipment industry.

This award highlights the importance of the technician career. Not only does it bring awareness of the technician shortage, but it also further promotes industry-specific jobs to students, parents, educators, and other stakeholders.

Qualifications:

- Nominations are open to all technicians with at least five years of experience.
- A winner from each of the following regions will be selected: Canada, Great Lakes, Midwest, Northeast, South Central, Southeast, and West. The location of a company's headquarters determines its region.
- A company may nominate up to three technicians for the award. All entered nominees will be up for consideration for the award during the current year, in addition to the two years following their submission.



KNAPHEIDE
SINCE 1848



AED BENCHMARKING REPORTS

STATE EQUIPMENT DEALER LAW BOOK

AED MEMBER PRICE: \$795 • NON-AED MEMBER PRICE: \$1590

Like most businesses, manufacturers and distributors must navigate a complex legal environment. The State Equipment Dealer Law Book addresses the state laws governing the relationship between distributors and manufacturers. It is designed to inform AED members about developments in dealer protection legislation and gives all in the equipment industry a better sense of their rights and responsibilities under the law.

COST OF DOING BUSINESS REPORT

**AED MEMBER PRICE: \$795 • PARTICIPANT PRICE: FREE •
AVAILABLE TO MEMBERS ONLY**

AED's Cost of Doing Business Report (CODB) provides members with the most up-to-date comparative financial performance information. This easy-to-understand report, available exclusively through AED, provides information that enables dealers to evaluate their own company's operating results.

The CODB report includes the following:

- Comparisons to evaluate operating ratios against the medians of other distributors
- Balance sheet and income/expense statement performance
- Distributor performance by sales volume
- Employee performance measures
- Sales mix of high-performance dealers
- Gross margins for new and used equipment, rental, parts and service departments
- Operating ratios, including debt to net worth
- Year-by-year trend analysis

RENTAL COMPANION REPORT

**AED MEMBER PRICE: \$595 • PARTICIPANT PRICE: FREE •
AVAILABLE TO MEMBERS ONLY**

AED's Rental Companion Report is a supplement to the Cost of Doing Business Report, presenting a detailed analysis of rental practices from the equipment distribution industry. It includes a compilation and analysis of rental financial and operations data segmented by sales volume, line of business, regions (based on climate), and a special grouping of "High Profit" dealers.

CROSS-INDUSTRY COMPENSATION & BENEFITS REPORT

**AED MEMBER PRICE: \$795 • PARTICIPANT PRICE: FREE •
AVAILABLE TO MEMBERS ONLY**

A competitive compensation and benefits package is one of the primary ways to attract and retain employees to your company. AED's Cross-Industry Compensation & Benefits Report provides reliable, compensation-related benchmarks for companies in wholesale trade and distribution. Easily compare compensation levels and benefit policies, analyze health care costs and trends, examine data on recruiting and retention, and more. This report is cross-industry, spanning numerous distribution specialties.

**Prices Subject to Change*

COMMITTEES & COUNCILS

EMERGING LEADERS COUNCIL

The AED Emerging Leaders Council exists as a network for the next generation of leaders in equipment distribution to connect and share with their peers outside of their traditional OEM dealer networks and provide AED with direction on how to better serve their demographic with educational and networking opportunities.

The group meets twice a year, once at the AED Summit and again at the AED Leadership Conference in August. The group also holds regular conference calls on varying topics. Members of the Emerging Leaders Council represent nearly all areas of the business.

Group Contact:

Suraj Varghese

630-528-7797 or svarghese@aednet.org

PUBLIC POLICY COUNCIL (PPC)

A select group of leading AED members that meet regularly to receive exclusive briefings from key policymakers and discuss the association's legislative and political activities.

Group Contact:

Jonathon Porter

630-940-9810 or jporter@aednet.org

WORKFORCE DEVELOPMENT COUNCIL

The AED Foundation (AEDF) is actively addressing the critical shortage of skilled professionals in the equipment industry. The Foundation established this committee to strengthen industry engagement, develop best practices further, and improve workforce-related challenges.

Group Contact:

Sean Fitzgerrel

630-468-5130 or sfitzgerrel@aednet.org

MANUFACTURERS ADVISORY COUNCIL

AED embraces our manufacturer members and established this group to give OEM executives a platform to share ideas that will help manufacturers engage more effectively and prosperously within the association.

Group Contact:

Jon Cruthers

630-468-5127 or jcruthers@aednet.org

AED PREFERRED PROVIDERS


The AED Preferred Provider Program

was established to provide special benefits available only to AED members from participating companies. The services and benefits provided by these partners are not commercially available to the general marketplace or to non-AED members.

AED has partnered with these companies to provide unique and advantageous offerings exclusively to AED members.

If you are interested in learning more about the Preferred Provider Program, CONTACT:

JON CRUTHERS

 630-468-5127

 jcruthers@aednet.org



PROPERTY & CASUALTY INSURANCE AND 401(K) BENEFITS

Sentry Insurance is one of the largest and most financially secure mutual insurance companies in the United States, holding an A+ (superior) rating* from A.M. Best. Sentry and its subsidiaries sell property and casualty insurance, life insurance, annuities, and retirement programs for businesses and individuals throughout the country. Headquartered in Stevens Point, Wisconsin, Sentry employs more than 4,000 associates in 41 states. See a complete list of underwriting companies at www.sentry.com.

**A+ (superior) A.M. Best Financial Strength Rating (FSR) current as of May 2018. See ambest.com for rating information.*

For more information, CONTACT:

ERIC STILES • www.sentry.com

 715-346-7272

 eric.stiles@sentry.com

AED PREFERRED PROVIDERS




INVESTMENT SERVICES

The J & R Group at Merrill Lynch is an institutional advisory and consulting team with more than 100 years of combined investment consulting experience. They are responsible for providing investment advice, institutional philanthropic and retirement plan consulting services, wealth and liability management, and financial planning services to clients who entrust them with over \$2.2B in assets. While they are headquartered in Chicago, they serve individual clients, companies and nonprofit institutions throughout the United States.

A sampling of those services are: Retirement plan advisory services | Institutional investment consulting | Cash and liability management | Equipment and Aircraft financing

For more information, or to have complimentary fiduciary benchmark of your retirement plan performed please CONTACT:

MICHAEL C. RIBICH • <http://fa.ml.com/jrgroup>

 312-696-7518

 Michael_ribich@ml.com




CREDIT CARD PROCESSING AND MERCHANT SERVICES

Perceptive Processing based in Kansas City, is a leading credit card processor focused in the equipment distribution industry. The owners came together after working for several other credit card processors with the objective to provide better support for their customers and improve how their customers can accept credit card payments. With a personal connection and specific industry focus on equipment distribution businesses, their understanding of the transactional nature of AED members business is key to their formula for success. AED members are eligible to receive significantly reduced credit card processing rates and complimentary payment software.

For more information, CONTACT:

MIKE DAVIS • www.perceptivepro.com

 816-405-2440

 mdavis@preceptivepro.com

AED PREFERRED PROVIDERS




BRANDED PROMOTIONAL PRODUCTS

Towsleys has been providing equipment manufacturers and distributors with creatively designed, branded promotional products for over 35 years. With customers across the country and internationally, Towsleys' product and service solutions are driven by your needs to build your brand with customers, distributors, and/or employees. From pens, caps or t-shirts to jackets and safety vests to custom designed products, Towsleys provides high value solutions to help you build your brand.

For more information, CONTACT:

JOHN NIEDERMEYER

 920-482-1128

 john@towsleys.com



**Construction Credit
& Finance Group**

DEBT COLLECTION SERVICES

Construction Credit & Finance Group is a construction debt collection firm with over 16 years of construction debt collection experience. Our software and transparency allow our clients to see our work in real time. We pride ourselves in respectful and diplomatic customer communications while preserving relationships with your customers. Our services range from Debt Collections, Collection/Accounts Receivable Software, Credit Department Consulting, Private Investigations, Lien Notices & Filings/Bond Claim Filings to Litigation. Our no collection no fee model allows for your company to avoid paying upfront fees for our collection services.

For more information, CONTACT:

VALERIE FORT • www.ccfcredit.com

 941-313-1292 cell or 239-331-5384 office

 vfort@ccfgcredit.com

AED PREFERRED PROVIDERS



TRANSACTIONAL CONTRACT AGREEMENTS

JWL International is a corporate and transactional law legal firm with over 25 years of experience in legal agreements pertaining to buying, selling, and leasing businesses, equipment, aircraft and real estate. James R. Waite, Esq. is a leading authority in the equipment industry related to dealer transactional contracts and offers AED members preferred rates on rental contract agreement services. He also offers services to AED members in the areas of: Franchise and Dealership Law; Merges & Acquisitions; Dealer Agreements (Writing, Review and Negotiation); and Corporate Law.

For more information, CONTACT:

NANCY LEVY • www.jameswaitelaw.com



866-582-2586

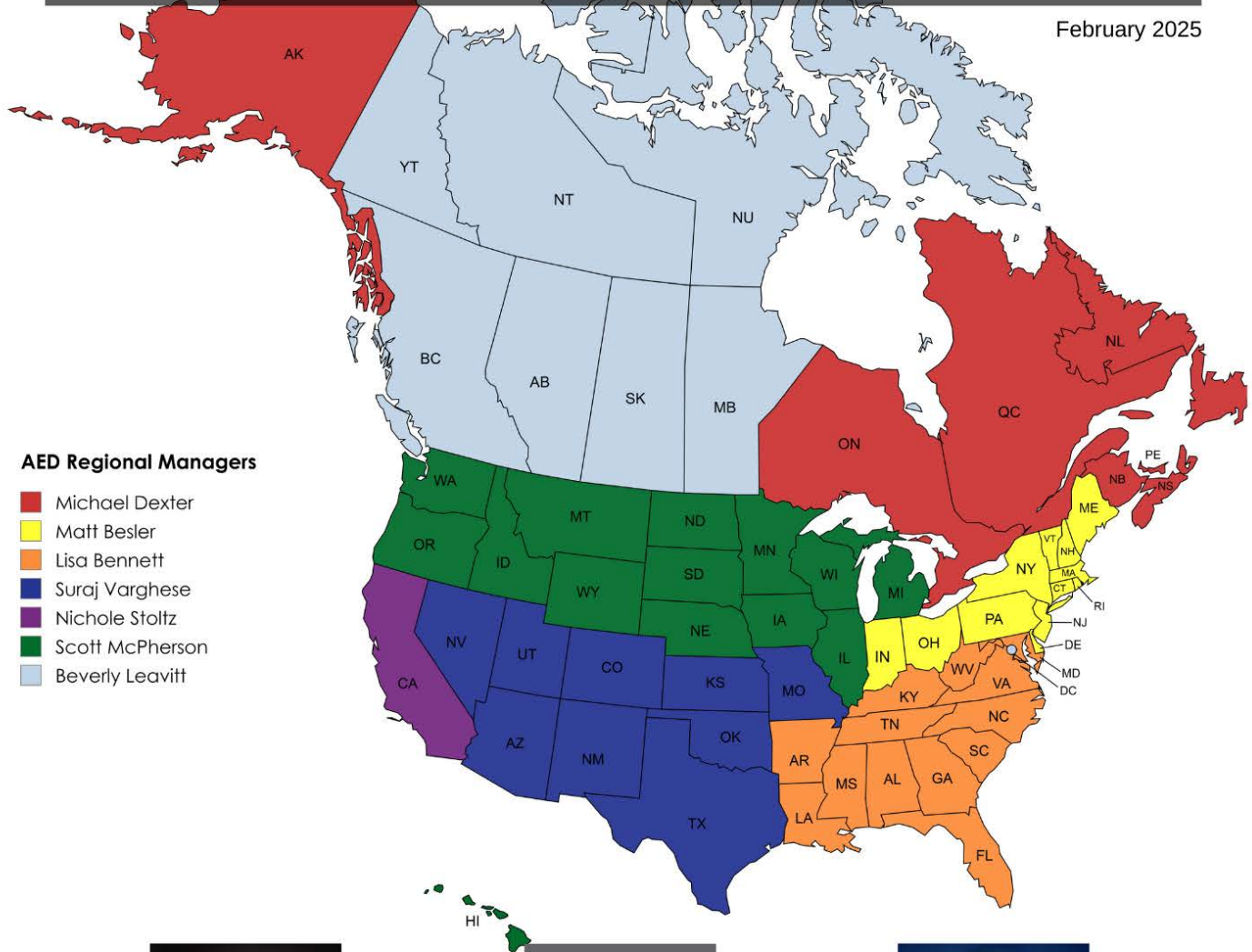


NWL@jwlinternational.com

MEET YOUR AED REGIONAL MANAGERS

AED Regional Managers serve dealerships and consumers from coast to coast. These dynamic individuals come from diverse background and bring extensive knowledge to the equipment industry. Our regional managers take great pride in being part of the Association, and they are your go-to contact for any questions your dealership may have.

February 2025



AED Regional Managers

- Michael Dexter
- Matt Besler
- Lisa Bennett
- Suraj Varghese
- Nichole Stoltz
- Scott McPherson
- Beverly Leavitt



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Phone: 630-574-0650

Website: www.aednet.org

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