

2023 AEC SUMMER MEETING

July 24-26

Grand Geneva Resort & Spa
7036 Grand Way Hwy 50 E
Lake Geneva, WI 53147



SCHEDULE-AT-GLANCE

Monday – July 24

10:00 am 18 or 9-hole Round of Golf
6:00pm Opening Reception & Dinner

Tuesday, July 25

9:00 am Networking Breakfast
9:45 am Opening Remarks
10:00 am Live Webinar: A Discussion with Distributors about the UPS Driver's Strike
10:45 am Break
11:00 am Insights from the C-Suite
12:00 pm Networking Lunch & Idea Exchange
1:00 pm Best Practices for Membership Recruitment and FAQs in an Era of Consolidation
1:45 pm Break
2:00 pm Financial Benchmarking for Associations: Unleashing Innovative Revenue
Generating Ideas
3:30 pm Lake Geneva Bar Crawl
7:00 pm Group Dinner

Wednesday, July 26

8:30 am Group Breakfast and Roundtable Discussions: Exploring Key Topics for
Distribution Associations
9:15 am AEC Government Relation Insights: Navigating the Current State of DC and
Collaborating for the Year Ahead
10:00 am Break
10:15 am Empowering Career Paths: Round Table Discussion on Executive Coaching for
Professional Development
11:00 am Break
11:15 am Maximizing Membership Training: Strategies for Revenue Generation and
Staying Competitive in a Changing Landscape
12:15 pm Closing Lunch and Strategy Session: Driving Awareness of Rewarding
Careers in Distribution within the AEC Industry w/ Grab-to-Go Option

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PROGRAM SESSIONS & SPEAKERS

Monday - July 24

10:00 am – 5:00 pm **Optional: 18 or 9-hole Round of Golf**

Description: Enjoy a delightful round of golf as you embark on either a 18-hole or 9-hole adventure. Immerse yourself in the scenic beauty of the course as you navigate through each hole, honing your skills and relishing the joy of the game. *If you RSVPed, you should have received your confirmation and tee time from NAW, if not please contact Rosie Rangel.*



6:00 pm **Opening Reception & Dinner**

Description: Indulge in an unforgettable evening as we kick off the event with our spectacular Opening Reception & Dinner. Join us for a delightful gathering filled with warm conversations, networking opportunities, and delectable cuisine. Immerse yourself in the lively atmosphere as you connect with fellow attendees, industry professionals, and distinguished guests. This event sets the stage for an engaging and memorable experience, creating the perfect ambiance to foster meaningful connections and set the tone for the exciting days ahead. Raise a glass, savor delicious flavors, and embrace the spirit of camaraderie during the Opening Reception & Dinner, where lifelong memories are made.

Tuesday - July 25

6:30 am **Optional Morning Workout: Pickleball**

Description: The morning pickleball lesson at the Grand Geneva Resort is a fun-filled session where participants of all skill levels have the opportunity to learn and practice pickleball. Led by an experienced instructor, attendees will receive valuable guidance on rules and gameplay.

9:00 am **Breakfast**

Description: Join us bright and early for a delightful breakfast spread and the perfect opportunity to connect with fellow AEC professionals. Engage in meaningful conversations, forge new relationships and strengthen existing ones as you enjoy a delicious meal in a relaxed and inviting atmosphere. Share insights, exchange ideas, and establish valuable connections that can enhance your professional journey. The Networking Breakfast is the ideal way to kickstart your day, energize your networking efforts, and make lasting connections at the AEC Summer Meeting.



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10:00 am – 10:45 am **Live Webinar: A Discussion with Distributors about the UPS Driver’s Strike**

Description: A UPS driver’s strike and potentially, UPS pilot’s strike, will impact every single American household and bring the US Supply chain to a standstill. This disruption blocks millions of dollars of essential products from getting to families, businesses, and institutions that need them to live, work, build, heal, educate, transport, fuel, and protect this great nation.

10:45 am – 11:00 am **Break**

11:00 am – 12:00 pm **Insights from the C-Suite**

Description: Keith Rozolis is the CEO of one of the largest and fastest growing distribution companies in the country. In this session, Keith will take you inside ABC Supply’s business to discuss the key drivers of its success to give you an insider’s view of how great distribution companies are running and to give you insights into the future of the distribution industry. Moreover, Keith will also delve into the significant role that trade associations play in the company’s overall strategy.

This unique opportunity to delve into ABC Supply’s business will give attendees invaluable knowledge on the inner workings of successful distribution enterprises and provide a glimpse into the future of the distribution industry. This session will offer practical takeaways and invaluable insights into building and sustaining a thriving distribution business.

Speaker: Keith Rozolis - President and CEO
ABC Supply



12:00 pm – 1:00 pm **Networking Lunch and Idea Exchange**

Description: Join us for a Networking Lunch and Idea Exchange session where you’ll have the opportunity to connect with and learn from your fellow AEC colleagues. This interactive session takes place during lunch, providing a relaxed and informal environment for idea sharing and collaboration.

During the networking lunch, you’ll have the chance to engage in meaningful conversations, exchange insights, and brainstorm innovative ideas with professionals from various sectors of the AEC industry. Whether you’re seeking fresh perspectives, looking for solutions to common challenges, or simply interested in expanding your professional network, this lunch is designed to facilitate productive discussions and foster connections.

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1:00 pm – 1:45 pm **Best Practices for Membership Recruitment and FAQs in an Era of Consolidation**

Description: In today's business landscape, consolidation is an ever-present reality, with organizations frequently merging or being acquired. This environment of rampant consolidation poses unique challenges for membership recruitment and necessitates a proactive approach to address the concerns and questions that arise.

In this informative session, we will explore the best practices for membership recruitment while emphasizing the context of widespread consolidation. We will delve into the frequently asked questions (FAQs) that potential members may have in such an environment and discuss strategies to address them effectively.

Attendees will gain insights into navigating the complexities of membership recruitment amidst consolidation. We will cover topics such as understanding the impact of consolidation on prospective members' decision-making processes, identifying, and addressing their concerns, and tailoring recruitment strategies to align with the current industry landscape.

Key Takeaways:

1. Understanding the dynamics of consolidation and its implications for membership recruitment.
2. Identifying common FAQs and concerns potential members may have during periods of consolidation.
3. Developing effective strategies to address these concerns and provide satisfactory answers.
4. Tailoring membership recruitment approaches to align with the current industry landscape.
5. Leveraging opportunities created by consolidation to attract new members and strengthen existing relationships.

Join us for this insightful session to enhance your recruitment strategies and navigate the challenges posed by consolidation with confidence.

Speaker: Scott Seril, CDM – Senior Director
Marketing General Incorporated



1:45pm – 2pm Break

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2:00 pm – 3:00 pm **Financial Benchmarking for Associations: Unleashing Innovative Revenue Generating Ideas**

Description: In today's competitive landscape, associations face the dual challenge of ensuring financial stability while exploring innovative avenues for revenue generation. To thrive in this dynamic environment, it is crucial for associations to leverage the power of financial benchmarking and explore creative strategies to generate sustainable revenue.

Join us for an insightful session where we delve into the world of financial benchmarking specifically tailored for associations. We will explore the importance of benchmarking financial performance against industry standards and best practices, and how it can serve as a valuable tool for informed decision-making.

Through interactive discussions and real-life examples, attendees will gain practical insights into implementing financial benchmarking techniques and fostering a culture of innovation within their associations. From exploring alternative revenue models to leveraging technology and strategic partnerships, we will explore a range of possibilities to unlock new sources of revenue.

Key Takeaways:

1. Understanding the significance of financial benchmarking for associations in ensuring financial stability and growth.
2. Exploring the process of benchmarking financial performance against industry standards and best practices.
3. Uncovering innovative revenue generating ideas through case studies and emerging trends.
4. Identifying alternative revenue models, leveraging technology, and fostering strategic partnerships.
5. Developing a roadmap for implementing financial benchmarking and innovative revenue generating strategies within associations.

Join us for this enlightening session to discover how financial benchmarking can empower your association's financial decision-making and to unlock innovative ideas that can drive sustainable revenue growth. Together, we will explore new possibilities and pave the way for a prosperous future for your association.

Speaker: Jason K. Blake – President
Petroleum Equipment Institute



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3:30pm – 6:00 pm **Lake Geneva Bar Crawl**

Description: Come and experience an extraordinary Lake Geneva Bar Crawl that you won't forget. Get on board the Grand Geneva trolley as we embark on a journey to three remarkable destinations.

Our first stop is Topsy Turvy, an exceptional brewery housed in a beautifully converted church. Next, we'll make our way to Geneva Tap House, where you'll find an impressive array of 50 self-serve taps to explore. Lastly, we'll visit the lively Champs Sports Bar for a vibrant atmosphere and great company.

Beyond the bar hopping adventure, this crawl provides an excellent opportunity for networking and building connections. Engage in thought-provoking discussions inspired by the Jeffersonian style, covering a variety of engaging topics. Join us for a night filled with camaraderie and the thrill of exploring Lake Geneva's bar scene. Raise your glasses and let the fun begin!



7:00pm – 9:00 pm **Group Dinner**

Description: Join us for a delightful group dinner on the Greenview Lawn of Grand Geneva. We'll gather for a cookout-themed evening, complete with delicious food and fun games. Engage in friendly competition with activities such as Corn Hole, Giant Jenga, and Spike ball, all while enjoying the stunning view of Lake Geneva. It's the perfect opportunity to relax, connect with others, and savor the picturesque surroundings. Don't miss out on this enjoyable evening of great food, laughter, and lakeside views.





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6:30 am – 7:30 am **Optional Morning Workout: Yoga**

Description: The morning yoga class at the Grand Geneva Resort provides a serene and revitalizing experience for participants of all levels. Led by a knowledgeable instructor, attendees practice various yoga poses, focusing on breath control and mindfulness. The tranquil setting and gentle guidance create a peaceful atmosphere, leaving participants feeling centered and refreshed.

8:30 am – 9:15 am **Group Breakfast and Roundtable Discussions: Exploring Key Topics for Distribution Associations**

Description:

1. Association Rebrand – When is it time to do so? Explore the intricacies of association rebranding and determine the right time to embark on a rebranding journey. Discuss the factors that influence rebranding decisions, such as shifting industry landscapes, changing member needs, or evolving organizational identities. Share insights, experiences, and best practices with fellow participants to gain a comprehensive understanding of the rebranding process.
2. Staff Onboarding / Keeping and Retaining: Examine strategies for effectively onboarding new staff members and creating an environment that fosters employee retention. Discuss techniques for attracting top talent, implementing comprehensive onboarding programs, and nurturing a positive organizational culture that supports staff growth and engagement. Share experiences, challenges, and success stories with your peers in this roundtable discussion
3. Climate File – Sustainability in Distribution: Dive into the critical topic of sustainability within the distribution sector. Explore ways associations can promote and encourage sustainable practices among their members. Discuss initiatives, policies, and best practices that drive sustainability in distribution, including energy efficiency, waste reduction, and supply chain sustainability. Collaborate with participants to identify opportunities for industry-wide action and inspire positive change.
4. How to use AI Technology in your Associations: Discover the potential of AI technology in enhancing association operations and member experiences. Share insights and experiences on successful AI implementations, such as chatbots, personalized recommendations, data analytics, and automation. Discuss the challenges and considerations associated with implementing AI technology in associations and explore innovative applications that can revolutionize member engagement and organizational efficiency.

Key Takeaways:

1. In-depth understanding of the selected roundtable topic.
2. Insights, experiences, and best practices shared by fellow participants.
3. Practical strategies and solutions for challenges associated with the chosen topic.
4. Networking opportunities and connections with like-minded professionals.
5. Actionable ideas and inspiration to drive positive change within your association.

Participate in this session to engage in meaningful discussions, share your expertise, and gain valuable insights into the selected topic of interest. Together, we will explore new horizons and shape the future of distribution associations in an ever-evolving landscape.



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9:15 am – 10:00 am **AEC Government Relation Insights: Navigating the Current State of DC and Collaborating for the Year Ahead**

Description: We are thrilled to introduce Brian Wild as NAW's new Government Relations Director, and we invite you to join us for an exciting and engaging session to get to know Brian better. This FAQ session is designed to be both informative and enjoyable, providing insights into Brian's background, expertise, and vision for NAW's government relations efforts.

During this session, we will dive into a range of frequently asked questions, allowing you to learn more about Brian's professional journey, his insights on navigating the political landscape, and his strategic approach to advocacy on behalf of NAW and its members. The session aims to foster a friendly and relaxed atmosphere, ensuring that everyone feels comfortable engaging with Brian and participating in the discussion.

In addition to getting to know Brian, we will also delve into the current state of play in Washington, D.C. Brian will provide an overview of the political landscape, legislative developments, and key factors influencing the AEC industry. He will shed light on what to expect in the year ahead, offering valuable perspectives on how these dynamics may impact NAW AEC members.

Key Takeaways:

1. Get acquainted with Brian Wild, NAW's new Government Relations Director, and learn about his professional background and expertise.
2. Engage in a fun FAQ session, where we will ask Brian questions about his role, approach to advocacy, and strategic vision.
3. Gain insights into the current state of play in Washington, D.C., and its potential impact on the AEC industry.
4. Understand the legislative developments and factors that may shape the industry's future in the year ahead.

Join us for this exciting session to connect with Brian Wild, get answers to your burning questions, and gain valuable insights into the current state of play in D.C. Together, we will build a stronger understanding of NAW's government relations efforts and the political landscape that shapes our industry's future.

Speaker & Host:

Brian Wild, Chief Government Relations Officer

Eric Hoplin, Chief Executive Officer at National Association of Wholesaler- Distributors (NAW)





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10:00 am-10:15 am Break

10:15 am – 11:00 am **Empowering Career Paths: Round Table Discussion on Executive Coaching for Professional Development**

Description: Join us for an enriching round table discussion centered around executive coaching and its profound impact on professional development. This session is designed to provide a platform for participants to explore the benefits, strategies, and best practices associated with executive coaching in shaping successful career paths.

Through engaging discussions and knowledge-sharing, participants will gain a deeper understanding of how executive coaching can enhance leadership skills, foster personal growth, and accelerate career progression.

The round table format allows for a collaborative environment where attendees can learn from one another's experiences, challenges, and successes in utilizing executive coaching for their career advancement. Topics of discussion may include identifying coaching opportunities, selecting the right coach, setting achievable goals, and integrating coaching techniques into daily work practices.

Key Takeaways:

1. Understanding the role of executive coaching in career development and professional growth.
2. Discovering effective strategies and best practices for maximizing the benefits of executive coaching.
3. Learning from real-life experiences and success stories shared by industry professionals.
4. Exploring the potential of executive coaching in unlocking leadership potential and enhancing professional effectiveness.
5. Networking and connecting with like-minded individuals in the field, fostering valuable relationships and mentorship opportunities.

Whether you are a seasoned executive seeking new avenues for growth or an emerging leader navigating your career path, this round table discussion offers a unique opportunity to gain valuable insights, expand your network, and empower your career trajectory through the transformative power of executive coaching.

Join us for this empowering session and be a part of the dynamic conversation on leveraging executive coaching to unlock your full potential and achieve remarkable career success.

Speaker: Patricia Cimino
Personal/Professional Growth Coach & Speaker





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11:00 am – 11:15 am Break

11:15 am – 12:15 PM **Maximizing Membership Training: Strategies for Revenue Generation and Staying Competitive in a Changing Landscape**

Description: Membership training holds significant importance for trade associations, serving as a valuable revenue source and a key element of the member value proposition. However, in the case of HRAI, we have recognized a growing disparity between our training offerings and the evolving marketplace. To address this challenge, we have made substantial investments in enhancing our training curriculum and embracing digital transformation.

Join us for an enlightening session led by Sandy MacLeod, where she will share HRAI's findings and present the choices we have made for the future. We will delve into the crucial role of education-related revenues, which contribute approximately 30% of our total revenues, and explore strategies to maximize this revenue stream.

During the session, we will examine the areas where HRAI has identified room for improvement in our training curriculum and discuss the steps taken to bridge the gap. Sandy will highlight the importance of staying competitive in the ever-changing marketplace and present the choices we have made to ensure HRAI remains at the forefront.

Key Takeaways:

1. Understanding the significance of membership training as a revenue source and member value proposition for trade associations.
2. Recognizing the challenges posed by a changing marketplace and the importance of staying competitive.
3. Exploring HRAI's findings regarding the effectiveness of our training curriculum and digital transformation efforts.
4. Discovering the choices HRAI has made to address shortcomings and enhance our training offerings.
5. Gaining insights into strategies for maximizing education-related revenues and strengthening member engagement.

Join us for this session to gain valuable insights into revenue generation through membership training and to discover the steps taken by HRAI to adapt and thrive in an evolving landscape.

Speaker: Sandy MacLeod - President & CEO
Heating, Refrigeration and Air Conditioning Institute of Canada (HRAI)





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12:15 pm – 1:00 pm **Lunch Buffet and Strategy Session: Driving Awareness of Rewarding Careers in Distribution within the AEC Community**

Description: The session will kick off with a networking breakfast, providing an opportunity to connect with like-minded individuals who are passionate about shaping the future of distribution careers. Following breakfast, we will transition into a dynamic group discussion and strategy session.

Drawing upon the collective expertise and experiences of the participants, we will brainstorm innovative ideas, share best practices, and identify actionable steps to implement a comprehensive awareness campaign. The session will foster collaboration and encourage the exchange of insights and success stories to inspire and guide initiatives within individual organizations and the industry as a whole.

Key Takeaways:

1. Networking opportunities to connect with industry professionals passionate about distribution careers.
2. Understanding the challenges and opportunities in raising awareness of rewarding careers in distribution.
3. Exploring effective strategies to showcase the growth potential, job satisfaction, and impact of distribution careers.
4. Brainstorming innovative ideas and sharing best practices for an impactful awareness campaign.
5. Developing actionable steps to drive awareness and attract talent to distribution careers in the AEC community.

Join us for this energizing Group Breakfast and Strategy Session to contribute to the collective efforts of the AEC community in promoting the rewarding careers available in distribution. Together, we can inspire the next generation of professionals and ensure a thriving future for this vital sector of the industry.

Host: Eric Hoplin, Chief Executive Officer at National Association of Wholesaler-Distributors (NAW)

**Grab-and-go option available*