PEMA® 2026 FALL MEETING PROGRAM

Hilton Cincinnati Netherlands Plaza Hotel ♦ Cincinnati, Ohio
September 14-15, 2026
Program as of 7-14-26

SUNDAY • SEPTEMBER 13, 2026

2:30 p.m. – 6:00 p.m.	**Optional Outing – Guided Tour of the Cincinnati Brewing Heritage Trail** Explore the social and economic past of Cincinnati with this private guided tour of the historic brewing district. We'll meet in the lobby of the Netherland Plaza Hotel, walk to Fountain Square and travel by streetcar to the Over-the-Rhine neighborhood. Tour stops will include: • Christian Moerlein Brewery structures that include the malthouse, bottling, office, and stock house • Jackson Brewery & underground lagering cellars • a visit to Findlay Market, the oldest operating municipal market in Ohio • A refreshment break at Rhinegeist Brewery • And more! We'll return to Fountain Square by streetcar. While not a strenuous tour, be sure to wear comfortable shoes and dress for the weather. Note: a separate fee applies to this outing. Sponsored by Stedman Machine Company.

MONDAY • SEPTEMBER 14, 2026

8:30 a.m. – 10:30 a.m. **Salon BC**	**Board of Directors Meeting**
11:00 a.m. – 12:30 p.m. **Caprice 2&3**	**Emerging Leaders Program Session 1 (with lunch)** *This session is limited to PEMA ELP participants only.*
12:45 p.m. – 2:00 p.m. **4th floor registration office**	**Registration**
1:30 p.m. – 3:00 p.m. **Pavillion**	**Setting Expectation for 2027 and Beyond** ***✳Taylor St. Germain*** Uncertainty makes even the strongest businesses hesitate. When markets shift, leaders need more than forecasts – they need clarity, context, and a plan. This session will help business leaders understand what is coming next, how it will affect their industry, and where to focus when conditions change. Inflation, interest rate changes, and margin pressures can derail pre-existing plans. Having a broad view of business cycle changes and sector-level drivers will help you identify risks and opportunities, aligning strategy, budgeting, and investments with forward-looking economic insight. While many markets improved this year, others experienced only muted growth and are at risk of hard landings in 2027. This session will delve into

the key macroeconomic drivers that will take hold next year or carry over from 2026. We will focus especially on the top economic drivers impacting your business – such as inflation, interest rates, labor, and geopolitical uncertainty – and their implications for overall cost structure, workforce strategy, the risk of profitless prosperity, and the timing of resource allocation across an organization.

3:00 p.m. – 3:15 p.m. **Break**

3:15 p.m. – 5:15 p.m. **AI in the Hot Seat**
Pavillion
✳Jon Lakefish, Founder Lakefish Group
One of the most popular speakers from the 2025 Fall Meeting, Jon will bring PEMA up to date on AI advances. He'll do a deeper dive in how to use AI tools for developing interactive financial dashboards from existing spreadsheets, demonstrate how to utilize AI for knowledge transfer, and provide other real-world techniques directly applicable to PEMA companies.

5:30 p.m. – 5:45 p.m. **Informa Markets Update**
Pavillion

6:00 p.m. – 8:00 p.m. **Networking reception-style dinner, Sponsored by Informa Markets**
Continental Room

TUESDAY • SEPTEMBER 15, 2026

7:45 a.m. – 8:45 a.m. **Roundtables with breakfast – See below for topics**
Caprice 1&4, 2, 3, Salon B, C & DE

9:00 a.m. – 10:30 a.m. **Continuing to Thrive in a Hyper-paced World**
Pavillion
✳Holly Green, Behavioral Scientist
Can you move fast with focus and flexibility in today's rapidly changing environment? Or do you constantly struggle just to keep up? Today's markets offer almost unlimited opportunities, but only for those companies prepared to take advantage of them. Using ideas, tools, and techniques from her best-selling book, Using Your Brain to Win, Holly reveals counterintuitive insights that market leaders use to stay ahead of the change curve and leave their competition behind. She will show you how to get crystal clear on where you need to go and what you need to do to get there, how to develop the discipline to pause and focus on the right things, and – most important – how to slow down to go fast.

You'll practice playing with your brain and learning tools and techniques you can immediately apply to be even more incredible.

10:30 a.m. – 10:45 a.m. **Break**

10:45 a.m. – 12:00 p.m. **Delta Ducon – Member Company Profile**
Pavillion **PEMA Business Meeting**

12:00 p.m. **Adjourn**

1:00 p.m. – 5:00 p.m. **Emerging Leader Program – Session 2: Personality Profile**
Caprice 2&3 *This session is limited to PEMA ELP 2026-27 cohort participants.*

PEMA 2026 Roundtable Topics

Succession Planning
How do you retain key future leaders who may become impatient, especially in small/medium or family-owned companies? How do you identify high performers early, keep them engaged, and retain them through organizational changes (packages, forced reductions, retirements) so they can become future successors? Have you established succession plans for both shop and office roles? Do your succession plans address all critical "pain points" across the company (including shop-floor roles), or are they focused mainly on top-level/office positions, and what challenges have you faced in doing this?

AI - Utilization and Integration
Where have you seen measurable ROI from AI, and where has it failed or stalled? How are you using AI as a "force multiplier" for redundant or routine tasks (e.g., marketing, lead generation, presentations, research, routing/planning)?Which AI tools or platforms (and combinations of tools) have proven most effective for your key use cases, and how have they impacted productivity (e.g., sales per employee, ability to do more with the same headcount)?

AI - Cybersecurity
How are you protecting your company and data integrity when using AI across the business? (Open by design so discussion can go in several directions.) Have you started to see contract language, bid specs, or terms & conditions that limit or prohibit the use of AI (e.g., "you cannot drop this into AI" or AI use as a potential breach of confidentiality), and how are you responding to that? What security protocols or precautions have you put in place to ensure corporate data (e.g., supplier information, costing, routing and planning data) remains secure when using AI—especially when deciding between closed-loop/internal AI vs. public tools? How do NDAs, confidentiality agreements, and customer IP requirements affect your use of AI (for example, using AI on bid specs or customer documents)—and where have you decided you cannot use AI at all because of those constraints?

Profitability Under Pressure (Note antitrust guidelines forbid any direct discussion of price)
Where are you currently getting the most cost pressure: labor, materials, energy, or pricing resistance? How is it evolving? How are you adjusting pricing strategies—indexing, surcharges, shorter validity, or value-based pricing? Are customers becoming more resistant, or more understanding, of price increases? What structural changes have you made (or need to make) to reduce costs and protect margins? What is working and what isn't working?