



# PEMA<sup>®</sup> 2027 Annual Meeting

## PROGRAM

JW Marriott • Cancun, Mexico | February 24–27, 2027

*As of 09-30-26*

### The Week at a Glance

| WEDNESDAY<br>February 24                                                                                                                                       | THURSDAY<br>February 25                                                                                                                                                                           | FRIDAY<br>February 26                                                                                                                                                                               | SATURDAY<br>February 27                                                                                                                                                                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Emerging Leaders Session</li><li>• Board of Directors Meeting</li><li>• Registration</li><li>• Welcome Party</li></ul> | <ul style="list-style-type: none"><li>• Roundtable Breakfasts</li><li>• General Session: Matt Jacobson</li><li>• Member Profile &amp; Business Meeting</li><li>• Reception &amp; Dinner</li></ul> | <ul style="list-style-type: none"><li>• Roundtable Breakfasts</li><li>• General Session: John Manzella</li><li>• Eric Termuende: Blueprint to the Future</li><li>• Reception &amp; Dinner</li></ul> | <ul style="list-style-type: none"><li>• Breakfast (Executives and Spouses)</li><li>• General Session: Kelly Brinkman</li><li>• Steve Mesler: Breaking the Drought</li><li>• Networking &amp; Recreation</li></ul> |

### WEDNESDAY | February 24, 2027

9:00 a.m. – 3:00 p.m.

#### Emerging Leaders Session

A full day of learning and connection for PEMA's Emerging Leaders.

3:30 p.m. – 5:00 p.m.

#### Board of Directors Meeting

5:30 p.m. – 7:30 p.m.

#### Registration

Check in, pick up your meeting materials, and say hello.

5:30 p.m. – 7:30 p.m.

#### Welcome Party

Kick off the week in Cancun with drinks, bites, and familiar faces.

7:45 a.m. – 9:00 a.m.

## Registration

Check in before the day's sessions begin.

8:00 a.m. – 9:00 a.m.

## Roundtable Breakfasts

Grab breakfast and a seat at the table that matters most to your business: small-group, peer-to-peer conversation with fellow executives.

1. Independent Sales Reps
2. AI
3. Board Governance & Strategic Oversight: Getting Real Value (Not Just Formality)
4. Employee Well-Being, Attendance & Productivity: What Actually Works?
5. TBD
6. ERP Planning

*Full topic descriptions are in Appendix A.*

9:15 a.m. – 11:15 a.m.

## GENERAL SESSION

### Matt Jacobson

*Session title and description coming soon.*

11:15 a.m. – Noon

## Member Profile & Business Meeting

Get a closer look at a fellow member company, then catch up on the latest PEMA business.

Afternoon

## Networking & Recreation

The afternoon is yours. Relax on the beach, explore Cancun, or catch up with colleagues.

Evening

## Reception & Dinner

An evening of great food and even better company.

**8:00 a.m. – 9:00 a.m.**

**Roundtable Breakfasts**

Round two. Try a new table or go deeper on yesterday's topic.

- 1. Independent Sales Reps
- 2. AI
- 3. Board Governance & Strategic Oversight: Getting Real Value (Not Just Formality)
- 4. Employee Well-Being, Attendance & Productivity: What Actually Works?
- 5. TBD
- 6. ERP Planning

*Full topic descriptions are in Appendix A.*

**9:15 a.m. – 10:30 a.m.**

**GENERAL SESSION**

**John Manzella**

*Session title and description coming soon.*

**10:30 a.m. – 10:45 a.m.**

Break

**10:45 a.m. – 12:00 p.m.**

**FEATURED SPEAKER**

**Blueprint to the Future**

***Eric Termuende, Best Selling Author and Researcher***

Whether it's next week's weather or technology that hasn't been invented yet, the future is impossible to predict. Trends, charts, and forecasts are interesting, but the real advantage comes from building resilient systems and teams that can navigate whatever the future brings.

Workplace culture and leadership expert Eric Termuende delivers a customized, research-backed blueprint that has helped thousands of category-leading teams build trust, remove friction, and prepare for a future that is changing constantly, unpredictably, and faster than ever before.

**You'll walk away with:**

- ✓ A practical guide to building teams that are more productive, engaged, creative, and innovative
- ✓ Lessons from industry leaders, icons, and trailblazers from around the world
- ✓ Ways to build trust, remove friction, and create a culture of experimentation

**Afternoon**

**Networking & Recreation**

Another afternoon to enjoy the resort and each other's company.

**7:00 p.m. – 9:30 p.m.**

**Reception & Dinner**

Gather for a festive evening of dinner, drinks, and conversation.

8:00 a.m. – 9:00 a.m.

## **Breakfast** (Executives and Spouses)

Start the final day together over breakfast.

9:15 a.m. – 10:30 a.m.

## GENERAL SESSION

### **Kelly Brinkman**

*Session title and description coming soon.*

10:30 a.m. – 10:45 a.m.

Break

10:45 a.m. – Noon

## CLOSING KEYNOTE

### **Breaking the Drought: High-Performance Leadership and Teamwork, from the Sled to the Boardroom**

**Steve Mesler, Olympic Gold Medalist**

On February 27, 2010, four Americans pushed a sled for 50 meters in perfect sync and ended a 62-year Olympic drought. On the anniversary of that run, Hall of Fame gold medalist Steve Mesler shares what it took to get there, and how he carried those same skills forward: founding and growing an organization that has reached more than 5 million students, serving on the board of the U.S. Olympic & Paralympic Committee, and now coaching executives and pro athletes on mindset, leadership, and operational excellence.

#### **Leaders will walk away with:**

- ✓ A mindset for performing under pressure
- ✓ Practical tools for aligning teams and developing the next generation of leaders
- ✓ A way to sustain results without burning out the people who deliver them

★ *Bring your camera! Steve will have his Olympic gold medal with him and will stay after the session to answer questions, keep the conversation going, and take pictures.*

Afternoon and Evening

## **Networking & Recreation**

Make the most of your final afternoon and evening in Cancun.

## APPENDIX A | ROUNDTABLE TOPICS

Roundtable Breakfasts run Thursday and Friday, 8:00 a.m. – 9:00 a.m. Each table is a small, candid, peer-to-peer conversation. Come with your questions, your wins, and your war stories.

### 1. Independent Sales Reps

*Getting the most from your rep network*

- Do you use independent sales reps as a sales channel?
- If so, how has this selling strategy and business model evolved over the past few years?
- What trends do you see in the field with sales representative agencies and how will these trends affect your company?
- What have you found to be the best sources and methods of finding sales reps that fit your company's served markets, products and culture?
- What types and frequency of product training do you provide your sales reps?
- Have you found successful ways to measure your reps' performance and effort on your company's behalf beyond just the top line (number of orders, number of customers, breadth of your product line sold, orders by industry, sales calls made, steak joint where they took you)?
- Have you established a Rep Council or Rep Advisory Group?

### 2. AI

*Where is your company with this whole AI thing?*

- So, where is your company now with this whole AI thing?
- At what level have you been able to implement an AI strategy into your company or is AI just a four-letter word?
- Do you have an AI Czar or key management overseer of AI utilization and internal policies?
- Has your company's use or desire to use AI changed your hiring practices, required employee skill sets or employee training programs?
- What are some of the most effective productivity improvements you've experienced with AI?
- Any AI missteps to share with your PEMA colleagues?
- Has ChatGPT become your new best friend?

### 3. Board Governance & Strategic Oversight: Getting Real Value (Not Just Formality)

*Making your board (or advisors) earn their seat*

- What role does your board (or advisory group) actually play today: strategic partner, accountability mechanism, or formality?
- For those with boards: what have been the most valuable contributions from outside members? Where have they not added value?
- For those without boards: what's holding you back? Control, cost, confidentiality, or unclear ROI?
- How do you ensure your leadership team gets honest, constructive challenge (whether from a board, advisors, or internally)?
- How often do you revisit strategy at the board level?
- What does effective governance look like in practice?
- What metrics or reporting actually drive accountability?
- What governance or leadership structure changes are you considering in the next 2–3 years (e.g., adding independents, forming an advisory board, formalizing reporting)?

### 4. Employee Well-Being, Attendance & Productivity: What Actually Works?

*What works after the free t-shirts are gone*

- What employee health and well-being issues are having the greatest impact on your workforce today, and where are you seeing the business impact—attendance, productivity, safety, retention or healthcare costs?

- Do the challenges differ between shop-floor, office, sales or remote employees?
- Which programs or benefits have actually worked after the free t-shirts and gift cards are gone?
- What success have you had with physical or mental health resources, fitness or preventive-care programs, EAPs, financial wellness, retirement planning or other initiatives?
- Which programs generated little participation or measurable benefit?
- How significant has financial stress become as an employee well-being issue?
- Have you offered financial education, retirement planning, emergency savings programs, student-loan assistance or other financial-wellness resources, and have employees used them?
- How are you addressing attendance, burnout and employee support while maintaining accountability?
- Have you changed PTO or attendance policies, scheduling, incentives or supervisor practices, and what role should managers play without becoming overly involved in employees' personal lives?
- With healthcare and pharmacy costs continuing to rise, what changes are you considering in benefit design?
- Are you changing deductibles, employer contributions, wellness incentives, pharmacy coverage or other elements while still remaining competitive for talent?
- How are you evaluating the cost and effectiveness of your overall approach, and what do you expect to change over the next two years?
- Are you measuring absenteeism, turnover, claims, engagement or productivity?

## 5. TBD

*Topic to be announced*

## 6. ERP Planning

*Standardize, customize, or move to the cloud?*

- How has your strategy with ERP changed in the last 3-5 years?
- Where do you draw the line between standardizing what your ERP does “out-of-the-box” versus customizing the ERP system to fit your operational/business needs?
- For those who have moved to a cloud-based ERP solution or are considering it, what were the deciding factors for the switch?
- What have you learned with making the change?
- What would you recommend to others considering to make the switch?
- What resources do you dedicate to your ERP system? Do you have a dedicated IT resource? Multi-disciplinary team?