PEMA® 2027 Annual Meeting

PROGRAM

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

As of 11-03-26

The Week at a Glance

Wednesday February 24	Thursday February 25	Friday February 26	Saturday February 27
• Emerging Leaders Session • Board of Directors Meeting • Registration • Welcome Party	• Roundtable Breakfasts • General Session: Matt Jacobson • Member Profile & Business Meeting • Reception & Dinner	• Roundtable Breakfasts • General Session: John Manzella • Eric Termuende: Blueprint to the Future • Reception & Dinner	• Breakfast (Executives and Spouses) • General Session: Kelly Brinkman • Steve Mesler: Breaking the Drought • Networking & Recreation

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.

Thursday | February 25, 2027

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. Material Testing: Balancing Safety, Risk, and Practicality
6. ERP Planning

Full topic descriptions are in Appendix A.

9:15 a.m. – 11:15 a.m.
Tulum A-C Ballroom

Featured Speaker

Matt Jacobson

Matt Jacobson, Product Liability and Litigation Risk Expert

Since COVID, jury verdict amounts have risen at an alarming rate. With increasing frequency, product manufacturers find themselves on the wrong side of these "nuclear" verdicts. This presentation will not only address the basics of product liability trends but address the commonly understood "why" juries across the United States are returning shocking verdict amounts. It will also touch upon practical strategies to employ to shelter your company from "nuclear" exposure.

You'll walk away with:

- ✓ A clearer understanding of current product liability trends and the post-COVID rise in jury verdict amounts
- ✓ Insight into why juries across the U.S. are returning "nuclear" verdicts against product manufacturers
- ✓ Practical strategies to reduce your company's exposure and protect it from outsized verdicts

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.

Friday | February 26, 2027

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. Material Testing: Balancing Safety, Risk, and Practicality
6. ERP Planning

Full topic descriptions are in Appendix A.

9:15 a.m. – 10:30 a.m.
Tulum A-C Ballroom

Featured Speaker

Economic Trends, Global Trade, Labor and What's Ahead

John Manzella, Global Business and Economic Trends Expert

Economic uncertainty, shifting global trade relationships, labor shortages, geopolitical risks, and rapid technological change are reshaping the business environment. In this timely session, John Manzella will break down the economic and global forces affecting U.S. businesses and what they could mean for manufacturers in the years ahead.

From economic growth, inflation, and energy to workforce demographics, automation, immigration, China, USMCA, and Europe, John will connect the issues shaping today's economy and provide insight into where they may be headed. Attendees will gain a clearer picture of the risks and opportunities ahead and strategies for navigating an increasingly complex global business environment.

You'll walk away with:

- ✓ A clearer understanding of the economic trends and risks that could affect your business
- ✓ Insight into labor shortages, shifting workforce demographics, automation, and strategies for attracting and retaining talent
- ✓ A better understanding of changing global trade relationships, including China, USMCA, and Europe

10:30 a.m. – 10:45 a.m.

Break

10:45 a.m. – 12:00 p.m.
Tulum A-C Ballroom

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.

Saturday | February 27, 2027

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.
Tulum A-C Ballroom

Featured Speaker

When Generations Connect: Turning Generational Differences into Organizational Strength

Kelly Brinkman, Workplace Culture & Generational Expert

Today's workplace brings together generations shaped by different experiences, expectations, communication styles, and relationships with technology. In this highly interactive session, Kelly Brinkman will help PEMA members move beyond generational stereotypes and explore how these differences influence communication, collaboration, feedback, technology adoption, and workplace expectations.

Customized for PEMA and the process equipment manufacturing industry, the session will focus on practical ways experienced professionals and emerging talent can learn from one another, strengthen working relationships, and turn generational differences into an organizational advantage as technology, AI, and the workforce continue to evolve.

You'll walk away with:

- ✓ Practical strategies for communicating and collaborating more effectively across generations
- ✓ A better understanding of how formative experiences shape workplace expectations, feedback preferences, and approaches to technology
- ✓ Ways to strengthen relationships between experienced professionals and emerging talent

10:30 a.m. – 10:45 a.m.

Break

10:45 a.m. – Noon
Tulum A-C Ballroom

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

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.Material Testing: Balancing Safety, Risk & Practicality

Moving from “Can we test it?” to “How can we test it responsibly?”

- What types of materials are creating the greatest testing challenges for your organization today?
- Where does your organization draw the line between eliminating risk and responsibly managing risk?
- Who ultimately owns the decision to accept or reject a higher-risk material, and what does your approval process look like?
- When a material raises concerns, should our first question be “Do we reject it?” or “What would it take to test this safely?”
- Based on what you’ve heard today, is there one thing you would consider changing, reviewing, or taking back to your organization regarding how you evaluate materials for testing?

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?