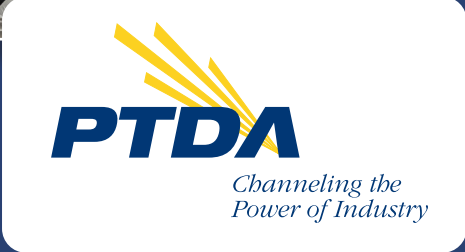


PTDA 2024
INDUSTRY
SUMMIT



**Broadening Horizons.
Elevating Excellence.**

COLORADO SPRINGS | OCTOBER 24-26



October 24-26, 2024

The Broadmoor
Colorado Springs, Colorado

Set among the beautiful backdrop of the Colorado Rockies and the ambiance of the prestigious Broadmoor, the 2024 Industry Summit is the ideal locale to reconnect with peers, broaden your network and elevate your knowledge of trends in the power transmission/motion control (PT/MC) industry.

Break away from your typical routine to gain fresh perspectives. You'll leave prepared to tackle challenges with new and diverse approaches that carry your business to new heights.

Throughout three days of the Industry Summit, you will:

- Learn about key economic indicators, market trends, and global developments to help make informed decisions to optimize operations and enhance profitability for you and your customers through 2025.
- Connect with a community of colleagues and partners who comprehend the challenges your business faces and are capable of collaborating with you to devise effective solutions.
- Enhance your understanding of the latest digital marketing trends, such as artificial intelligence, and discover how you can leverage them to influence customers, regardless of the size of your company.

SCHEDULE OF EVENTS

TUESDAY, OCTOBER 22

1:00 PM–5:00 PM PTDA Foundation Board of Trustees Meeting+

WEDNESDAY, OCTOBER 23

8:00 AM–10:00 AM Networking/Community Committee Meeting+
Professional Development Committee Meeting+
Past Presidents Council Meeting+

10:00 AM–12:00 PM End Customer Needs Committee Meeting+
Industry Insights Committee Meeting+
Manufacturer Council Meeting+

12:00 PM–1:00 PM Volunteer Recognition Lunch+

1:00 PM–5:00 PM PTDA Board of Directors Meeting+

THURSDAY, OCTOBER 24

8:00 AM–2:00 PM PTDA Foundation Golf Outing*

4:00 PM–5:00 PM Women in the Industry Social Hour+

5:00 PM–6:00 PM First-Timer Event+

6:00 PM–8:00 PM Welcome Reception

8:00 PM–9:30 PM Next Gen After Party+

FRIDAY, OCTOBER 25

8:00 AM–9:00 AM Welcome Breakfast

9:00 AM–10:00 AM Annual Business Meeting

10:15 AM–11:45 AM Opening Keynote: PT/MC Business Climate Update with Taylor St. Germain, ITR Economics

12:00 PM–12:30 PM Networking Lunch
Featuring Family-Owned Business Leaders Roundtable+

12:45 PM–1:45 PM Concurrent Breakouts

- Gearing for Growth: Driving Deep Transformation with AI with Ramy Nassar
- Modern Marketing: Battling for Attention and Influence in a Digital World with Steve Lerch

2:00 PM–4:00 PM MD-IDEX: Manufacturer–Distributor Idea Exchange
Open time; no scheduled appointments.
Distributors sit at booths.

4:30 PM Manufacturer Hospitalities on-site may begin

7:00 PM Manufacturer Hospitalities off-site may begin

SATURDAY, OCTOBER 26

Breakfast on your own

8:30 AM–12:35 PM MD-IDEX: Manufacturer–Distributor Idea Exchange
Scheduled appointments. Exhibitors sit at booths.

12:45 PM–1:15 PM Networking Lunch

1:30 PM–2:30 PM Keynote: Lemons to Laughs: Get All the Good the Day Has to Give with Tim Gabrielson

6:00 PM–8:00 PM Farewell Event: Après Ski

* Optional event with separate fee

+ By invitation only

Presentations



KEYNOTE

Friday, October 25

10:15–11:45 AM

PT/MC Business Climate Update

Taylor St. Germain

ITR Economics

ITR returns with a fresh economic outlook, providing insights to help you navigate risks and capitalize on opportunities for continued growth and competitiveness. St. Germain will explore crucial economic indicators, industrial production highlights, market trends and global economic developments, empowering you to make informed decisions into 2025 and beyond. Armed with this knowledge, you'll be equipped to optimize operations and enhance profitability for both you and your customers.



CONCURRENT SESSION

Friday, October 25

12:45–1:45 PM

Modern Marketing: Battling for Attention and Influence in a Digital World

Steve Lerch

Founder, Story Arch Consulting

As the world becomes more technologically advanced and more digitally dependent, you face new challenges in understanding, connecting with and capturing the attention of customers. With this emerges new opportunities to educate, persuade and sell. Whether you're the chief marketing executive of a global brand or the owner of a small family business with nothing but a Facebook page, you can do more to embrace new tools, evolve sales strategies and think outside the box. Lerch will explore ways social media, digital advertising, website strategy and storytelling can engage customers and driving them to action.



CONCURRENT SESSION

Friday, October 25

12:45–1:45 PM

Gearing for Growth: Driving Deep Transformation with AI

Ramy Nassar

Author and Acclaimed AI and Strategic Foresight Thought Leader

As emerging technologies continue to transform organizations, businesses must adapt and innovate to stay ahead of the curve. Nassar will dive into how systems like AI and ChatGPT can automate processes, enhance customer experiences and fuel strategic growth. Through hands-on examples, case studies and best practices, you'll develop a foundational understanding of AI and machine learning and understand best practices for leveraging them to drive organizational transformation.



KEYNOTE

Saturday, October 26

1:30–2:30 PM

Lemons to Laughs: Get All the Good the Day Has to Give

Tim Gabrielson

Comedian, Mentalist and Magician

Chances are you've encountered some sour situations, whether in your personal or professional lives. Gabrielson will have you looking at lemons in a whole new way during his jaw-dropping magic, face-hurting laughter and mind-blowing presentation. Learn how to activate a TIM (Temporarily Interrupting Mindset) so you can "pause-ively" interpret the world around you and respond instead of just react. He'll explain how to deflect toxicity and "squeeze the day" to tap into all the good it has to offer.



MD-IDEX: MANUFACTURER-DISTRIBUTOR IDEA EXCHANGE

Explore new business prospects or strengthen existing connections! Recognized as the most efficient and cost-effective method of conducting business by attendees, MD-IDEX offers outstanding value for channel partners eager to nurture relationships, address challenges and explore innovative avenues to boost revenue.

How Does MD-IDEX Work?

All manufacturer and associate* member companies with an MD-IDEX booth and all distributors attending the Industry Summit can participate. **Manufacturers and associates are required to reserve a booth for entry into MD-IDEX.** As an exhibitor, this gets you access to the MD-IDEX Hall for both sessions (Friday and Saturday) and allows you to participate in the process of scheduling appointments with attending distributors. Be sure to book your booth by September 16 for maximum exposure!

Back by popular demand, MD-IDEX will take place over two days. Whether a formal or informal discussion, it's amazing how much you can accomplish!

Friday, October 25 | 2:00-4:00 PM

Open Time—No Scheduled Appointments

Booths will be manned by distributor executives attending the Industry Summit

New for 2024, we're turning the tables—literally—for two hours of MD-IDEX. To offer more opportunities for you to connect one-on-one outside of scheduled appointments, for this session, each distributor member company will be assigned a table and be available for brief meetings with manufacturers or other distributors. Use this time to seek out and connect with those you might otherwise not be meeting with on Saturday. This format is also ideal for those wishing to make an introduction or conduct a brief conversation.

Day Two: Saturday, October 26 | 8:30 AM-12:35 PM

Scheduled Appointments

Manufacturers who reserved a booth may participate in up to eight, one-on-one, pre-scheduled 25-minute meetings to plan for business success in 2025.

Manufacturers wishing to reserve a booth must complete an MD-IDEX reservation form. About three weeks before the Industry Summit, both distributors and manufacturers may schedule October 26 appointments with each other using PTDA's scheduling software. More information about the process will become available closer to the event. Final appointment schedules will be available through the software prior to the Industry Summit.

Following the appointment schedule created, distributors and exhibitors meet in the exhibitor's reserved space to discuss current sales programs and begin planning for the upcoming year.

Visit ptda.org/MD-IDEX for more details and policies.

*Although associate members cannot directly schedule appointments with distributors, **distributors** can make appointments with associates. PTDA encourages associate members to reach out to those distributors with whom you want to meet and request they schedule an appointment with your company. Associate members wanting to meet with **manufacturers** will need to request a time outside of MD-IDEX.

“You can accomplish so much in so little time. Any other way it would cost thousands of dollars to meet with all those executives you can meet with during MD-IDEX.”

- Doug Savage, Bearing Service Inc.

Purposeful networking opportunities abound throughout the Industry Summit. Make the most of these events to establish new acquaintances or reconnect with friends and peers.

“We established relationships with new channel partners and came away with a better understanding of the current state of our industry.”

- CRAIG PIRIE, Daemar, Inc.



WELCOME RECEPTION

Thursday, October 24
6:00–8:00 PM

Welcome to the Rockies! Take a moment to relax and catch up with old friends and business associates and warmly welcome newcomers. This kick off provides the perfect opportunity to reconnect, strategize for the days ahead and unwind in the picturesque ambiance of the stunning Broadmoor, nestled near the base of Cheyenne Mountain.



FAREWELL EVENT: APRÈS SKI

Saturday, October 26
6:00–8:00 PM

Join your PT/MC peers and colleagues in celebrating your triumphs and raising a toast at the closing event, styled with après ski vibes. Take in the stunning landscape while gathering around the cozy firepits for engaging conversations. Indulge in a delicious dinner and enjoy the open bar, as is fitting for the grand finale of the 2024 Industry Summit.



WOMEN IN THE INDUSTRY (WITI) SOCIAL HOUR

Thursday, October 24
4:00–5:00 PM

Network with fellow women who are shaping the PT/MC industry and are committed to creating opportunities to attract, develop and support female colleagues. Camaraderie and connections are the focus of this social gathering featuring a networking format where you are guaranteed to create new contacts and launch new relationships. Be sure to indicate you are a woman in the industry when you register.



FIRST-TIMER EVENT

Thursday, October 24
5:00–6:00 PM

Prepare to ignite your enthusiasm for your inaugural Industry Summit experience! Meet with fellow first timers and glean valuable tips, insights and guidance from seasoned Industry Summit veterans. You'll leave ready to navigate and take full advantage of program offerings. Be sure to indicate your status as a first timer when you register.



NEXT GEN AFTER PARTY

Thursday, October 24
8:00–9:30 PM

Embodying the energy of the next generation, enjoy dynamic ice breakers, collaborative challenges and other friendly games amidst vibrant socializing. Whether you're building new connections or strengthening existing ones, you'll foster meaningful conversation and relationships with other ambitious and like-minded industry peers. Exclusively for delegates under 40, be sure to indicate your Next Gen status when you register.



NETWORKING LUNCHES

Take advantage of these opportunities to enjoy lunch, connect with industry peers and colleagues and recharge before afternoon presentations or MD-IDEX.

Friday, October 25
12:00 –12:30 PM

and
Saturday, October 26
12:45–1:15 PM

FAMILY-OWNED BUSINESS LEADERS ROUNDTABLES

Held during Friday's lunch, those who are leading their family's business are invited to sit at one of the specially reserved tables. Conversations will be used as a springboard for future family-owned business leadership programs and services. Be sure to indicate you are a leader in your family's business when you register.

HOTEL & TRAVEL INFORMATION



PTDA FOUNDATION GOLF OUTING

Thursday, October 24

8:00 AM – 2:00 PM (Shotgun start)

The East Golf Course at The Broadmoor

Option 1—Foursome: US\$2,000 greens fee

Option 2—Individual: US\$400 greens fee

Club rental: \$90 (*must reserve in advance*)

Renowned for its wide fairways, tree-lined paths, and stunning mountain views, The Broadmoor's East Course ranks among the nation's top golf destinations. Built against Cheyenne Mountain, its challenging terrain and deceptive greens demand precision from players. The East Course is boasted as the site of Jack Nicklaus' first U.S. Amateur win in 1959.

Fee includes cart, range balls, participation in the four contests on the course (longest drive, closest to the pin, hole-in-one and longest putt) and a continental breakfast and box lunch. See the registration page for all fees and to make your foursome selection. For golf outing sponsorship opportunities, visit ptda.org/Sponsor.

Registration for a foursome includes US\$1,573 for the cost of the outing and a US\$427 contribution to the PTDA Foundation. The registration fee as an individual golfer includes US\$393 for the cost of the outing and a US\$7 contribution to the PTDA Foundation.

The PTDA Foundation is a not-for-profit, tax-exempt 501(c)3 corporation whose operations are funded entirely by tax-deductible contributions from industry participants and program revenues.

The headquarters hotel of the
2024 Industry Summit

The Broadmoor

1 Lake Avenue

Colorado Springs, Colo. 80906

+1.844.602.3343

Reservations +1.800.634.7711

A favorite destination among PTDA members, we're excited to return to The Broadmoor for the 2024 Industry Summit. This legendary *Forbes* Five-Star and AAA Five-Diamond resort offers impeccable service and distinctive amenities. Personalized luxury offers an escape from the ordinary and modern details blend seamlessly with the timeless European elegance of this historic hotel.

The Broadmoor is nestled amidst the majestic peaks of the Rocky Mountains and stands as a beacon of timeless elegance and natural splendor. Surrounded by pristine wilderness and lush forests and set among beautifully manicured grounds, the property creates a picturesque backdrop for any occasion.

Members are encouraged to bring family and friends along to experience all the resort and surrounding area has to offer. Whether indulging in world-class dining, rejuvenating at the award-winning spa, or embarking on outdoor adventures that include golf, hiking, fly-fishing, or a visit to the Cheyenne Mountain Zoo or trek to the top of Pike's Peak, there's plenty to explore and enjoy on the property.

A block of rooms has been set aside for Industry Summit participants for US\$280 single/double per night for a Classic room, US\$296 single/double for a Superior Room and US\$313 single/double for a Premier room. PTDA has also negotiated a discounted daily resort service charge of US\$32 which includes in-room amenities (Wi-Fi, evening bottled water and ice delivery, hot beverage program), daily fitness classes and unlimited access to the Fitness Center, shuttle service to resort and select local activities and more.

Reservations will be taken on a first-come, first-served basis through **September 16** or until the block is filled (which will happen). After September 16, the hotel will release any unsold rooms in the PTDA block and

reservations will be taken on a space-available basis. The PTDA rate is available for stays from October 18 until October 30, 2024, but please note extended stays are strictly limited based on availability.

Hotel Cancellation Policy: All individual reservations must be guaranteed with one night's room and tax by credit card at the time of booking. In order to prevent a cancellation or change fee of **two night's room rate**, cancellation or reduction in arrival and/or departure dates must be confirmed no later than seven (7) days prior to your arrival date.

Access the booking link online at ptda.org/SummitHotel. You may also call +1.800.634.7711 and reference that you are with PTDA. Please only use the link provided above as our hotel contract ensures PTDA's rates are the lowest available on any public website.

Advance Registration Deadlines

To receive the early discounted registration fee, your registration form and payment must be received **no later than September 16**. To ensure inclusion in the advance PTDA registration list, registration form and payment must be received no later than September 16. Registration fees and information are available at ptda.org/SummitRegistration.

REFUND POLICIES

Delegate and Spouse/Companion Registration

Written cancellations received prior to October 10 will be refunded in full. Due to PTDA's contractual obligations with its vendors, no refunds can be issued for cancellations received on or after October 10.

PTDA Foundation Golf Outing

Written cancellations received prior to September 23 will be refunded in full. Cancellations received on or after September 23, including on-site cancellations, will be refunded only if the registered guest finds a substitute to fill the space.

Visit the ptda.org/SummitPolicies for the Event Code of Conduct, Publicity Photo and Video Acknowledgement, Attire, and Private Meetings and Entertainment Policies.

ptda.org/IndustrySummit



October 24-26, 2024
The Broadmoor
Colorado Springs, CO

PTDA 2024 Industry Summit

One form per delegate.

For more information, a downloadable and writeable PDF form or to register online, visit ptda.org/SummitRegistration.

Delegate Information

All contact information will be published in the final attendee list.

Full Name		Informal Name for Badge	
Title	Company		
Address	City	State/Province	ZIP/Postal Code
Country	Phone	Email	
LinkedIn Profile Address			

Special dietary requirements

	Y	N
Is this your first PTDA Industry Summit?	<input type="checkbox"/>	<input type="checkbox"/>
Are you a woman in the PT/MC industry?	<input type="checkbox"/>	<input type="checkbox"/>
Are you Next Generation (40 years old or younger)?	<input type="checkbox"/>	<input type="checkbox"/>
Are you a key decision maker at a family-owned business?	<input type="checkbox"/>	<input type="checkbox"/>
Will you be attending the Closing Event on 10/26 (included in your registration fee)?	<input type="checkbox"/>	<input type="checkbox"/>

Emergency Contact Information

Name	Phone
------	-------

PTDA complies with the Americans with Disabilities Act. If you have special requirements, please contact PTDA before September 13, 2024, at +1.312.516.2100.

Industry Summit Registraton Fees

Delegate Registration

	By Sept 16	By Oct 10	After Oct 10
PTDA Distributor Member	US\$1,220	US\$1,320	US\$1,420
PTDA Manufacturer/ Associate Member	US\$1,450	US\$1,550	US\$1,650
Non-Member Distributor*	US\$1,720	US\$1,820	US\$1,920
Non-Member Manufacturer*	US\$1,950	US\$2,050	US\$2,150

*Note: Non-member registration must be approved by PTDA.

Contact us at ptda@ptda.org.

Delegate Registration Fee \$ _____

You may transfer a registration to another company employee without penalty. Contact us at ptda@ptda.org.

Spouse/Companion Registration

Complete this section only if your spouse/companion will be joining you.

Spouse/Companion Full Name _____

Informal Name for Badge _____

Special dietary requirements _____

Spouse/Companion fee reflects PTDA's actual costs. No markup has been added. See section below regarding registration for optional events.

Option 1: All-inclusive registration fee includes Welcome Reception (10/24); Welcome Breakfast, Networking Lunch, Closing Keynote and Closing Event (10/26). Save 10% compared to registering for each event individually.

US\$645 _____

Option 2: A la carte registration if not registered under Option 1 and spouse/companion will only be attending specific events.

• Welcome Reception (10/24) US\$226 _____

• Welcome Breakfast (10/25) US\$88 _____

• Networking Lunch & Closing Keynote (10/26) US\$138 _____

• Closing Event (10/26) US\$259 _____

Spouse/Companion Subtotal \$ _____



Optional Event Registration

PTDA Foundation Golf Outing

Create a foursome of delegates and/or spouses/companions by selecting Option 1 or register yourself and/or your spouse/companion using Option 2.

Option 1: FOURSOME US\$2,000 _____

Please confirm participation with the members of your foursome before completing this portion of the form. If someone in your foursome needs club rental and the cost will not be covered by the foursome sponsor, please be sure the delegate requests club rental on his/her registration form.

Submission deadline for Option 1 is September 13, 2024.

FOURSOME HOST:

Player Name & Company _____

Club Rental Left Right US\$90 _____
 Male Female

PLAYER 2:

Name & Company _____

Club Rental Left Right US\$90 _____
 Male Female

PLAYER 3:

Name & Company _____

Club Rental Left Right US\$90 _____
 Male Female

PLAYER 4:

Name & Company _____

Club Rental Left Right US\$90 _____
 Male Female

Option 2: INDIVIDUAL

Delegate Golf US\$400 _____

Club Rental Left Right US\$90 _____
 Male Female

Spouse/Companion Golf US\$400 _____

Club Rental Left Right US\$90 _____
 Male Female

Optional Event Subtotal \$ _____

Your Registration Totals

Delegate Registration Fee \$ _____

Spouse/Companion Subtotal \$ _____

Optional Event Subtotal \$ _____

Grand Total Due \$ _____

Return payment and BOTH PAGES of this form to:

PTDA

230 W Monroe, Ste 1410
Chicago, IL 60606-4703

Fax: +1.312.516.2101
ptda@ptda.org

For refund policies, please visit our website, ptda.org/SummitRegistration

Payment Options

Payment must be included with this form to qualify for the early discounted registration fee and to appear on the early-release registration list. Registrations will not be processed until payment is received.

I have enclosed a check payable to PTDA

Charge my credit card*

MasterCard Visa American Express

I will be paying via ACH. *Access ACH information at ptda.org/ACH*

Card No. _____

Exp. Date _____ CSC _____

Cardholder Name _____

Cardholder Address _____

Cardholder Signature _____

**Credit card payments will be charged in U.S. dollars but will appear on your credit card statement in your local currency.*

For assistance with your registration, please email ptda@ptda.org.

