



**CURRIE**  
MANAGEMENT  
CONSULTANTS, INC.



# **The 2017 Currie Best Practices Summit**

**November 6, 7, 8, 2017**

**Westin Dallas/Fort Worth Airport Hotel  
Irving, Texas**

508.752.9229

[www.CurrieManagement.com](http://www.CurrieManagement.com)

*Leadership – Networking – Growth – Operational Excellence*

# MONDAY, NOVEMBER 6, 2017

Noon to 6pm

Registration

6pm – 9pm

Marketplace – Welcome Reception

# TUESDAY, NOVEMBER 7, 2017

7am – 8am

Breakfast – Bluefire Grille

8am – 9:30am



**Plenary Session with Robert P. Currie,  
Principal at Currie Management Consultants**  
Irving Lecture Hall

Bob is opening the Summit with a perspective on the changing requirements for leading an enterprise in today's world. That overview will talk about the issues of balancing business requirements (the profit motive) and the changing nature of the workforce (the empathy motive). These two are not in conflict, but, require a leadership style that maximizes both – performance and engagement.

9:30am – 10am

Break & Networking

10am – Noon

Choose one of the following Break-Out Sessions:

## **Building your Bench Strength**

Sunnyside Room

Attract, Hire and Retain Employees. Learn success strategies in building bench strength through attracting qualified employees, hiring the best, and retaining these new hires through career path development from a panel of Human Resource professionals.

### ***Peggy Haynes, VP Human Resources at Shoppa's Material Handling.***

They are a one stop full-service Toyota forklift and material handling dealership with nine locations in northern Texas and Missouri. In addition to the Toyota Industrial Product line, they carry narrow aisle forklifts, pallet jacks, aerial equipment, spotter trucks, golf cars, floor cleaning equipment and utility vehicles. Their brands include Toyota, Bendi, Drexel, Genie, JLG and Advance.

***Dustin Adams, Talent Manager at Hutson, Inc.*** a John Deere dealership, Hutson has grown into 13 locations throughout the heartland of the United States. The Hutson product offering has grown over the years to include Lawn & Garden, Commercial Worksite, Ag Management Solutions, and Commercial Application Products. Recently, Hutson has added new divisions to provide irrigation and agronomic support for our customers. We pride ourselves in being able to provide the highest quality support and service that our customers expect and come back for year after year.

### ***John VanDeusen, Executive Partner, Currie Management Consultants.***

John came to CMC from the global Human Resources leadership team at Bose Corporation, where his duties included oversight of the company's organization development, leadership development, management development and executive succession/talent review. He also helped Bose executives develop their strategy and teams and enhance business processes. His last assignment at Bose was to upgrade managers' ability to hire and onboard talent, manage performance and develop employees.

## **Leadership Lessons from the Greek gods to Jesus and Buddha**

Elm Room

From military strategy, sports, and politics, to philosophy and religion, unique and powerful business strategies can be found everywhere. The study of these various practices and processes can lead to abundant creativity, and stunning ideas for establishing your optimal desired culture and vision at work. What can we learn from the Greek gods, from Jesus, from Buddha? How can we apply their principles to our companies? And why would we want to? Robin Currie will lead you through some forgotten yet powerful concepts that are sure to elevate your organization to a higher level of employee and customer engagement, as well as assisting you in creating a more meaningful life, both at work and at home.

***Robin Currie, Senior Consultant, Currie Management Consultants*** is presenting this not to be missed session. Robin is a facilitator of Best Practices Groups and the Leadership Development Workshops. She is also the creator and developer of The Currie Training Center. Her depth of industry knowledge (agricultural equipment, material handling, power generation, compressors, construction machinery, commercial tires, and more) along with her understanding of dealership/distributorship operations together with her passion for leadership development is a sought-after combination. A graduate of Simmons College and a mother of four children, she remains passionate about the anti-slavery movement and is head of "Not for Sale" in New England.

Noon – 1pm

Lunch – Marketplace

1pm – 2:30pm

### Plenary Session -- The Future of Industrial Distribution

Irving Lecture Hall

Join this dynamic discussion on the future of industrial distribution. Will manufacturer owned distribution supplant private ownership? Will availability of private equity capital create only giant dealers? Will manufacturers tolerate multi-product distribution as it exists in automotive? And, where do we get the talent?

Facilitated by *Robert Currie, Principal of Currie Management Consultants, Inc.* Bob is well known in several industries where distribution questions are discussed every day.

2:30pm – 3pm

### Break & Networking

3pm – 5pm

#### Choose one of the following Break-Out Sessions:

#### Roundtable Discussions focused on Departmental Best Practices

Elm Room

Tables will be set up by Department with an experienced facilitator to lead the discussion on best practices and problem solving in that particular department (Sales, Service, Rental, Parts, Finance). To prepare for these sessions, bring your current/future challenges related to that department.

#### The Journey of the Dealer Principal: Moving In/Out of the Business

Sunnyside Room

Listen, question, and comment to three panelists on diverse ways to move into or out of your business.

*Garry Bartecki* is in the process of transitioning his rental company to an ESOP.

*Ken Clifford, President of Clifford Power Systems* will speak to moving out of the day-to-day business by developing a professional executive team.

*Jeff Fischer, CEO of Southern States Toyotalift* will speak on the decision to sell his company.

Facilitated by *Robert Currie, President of Currie Management Consultants Inc.*

6pm – 9pm

#### Dinner with Featured Speaker, Richard "Dick" Burleson

Trinity 6-8



Richard B. (Dick) Burleson is Vice President of Neel-Schaffer, one of the leading Engineering firms in the United States.

He is a native of Alabama and was inducted into the Alabama High School Sports Hall of Fame. Dick graduated from Georgia Tech with a Civil Engineering degree.

Besides his engineering career, Dick also rose to the Army Reserves highest rank, that of Major General. He graduated from the Army War College and was Commanding General of the largest Army Reserve Command in the World. His command covered eight states, 40,000 troops and included over 5,000 soldiers placed on active duty during Desert Storm. General Colin Powell personally decorated General Burleson's units.

One of his highest personal honors came, when General Burleson received the Spirit of America's – Audie Murphy Patriotism Award. He was only the 23rd American to receive this award.

In addition to his engineering and military careers, Dick Burleson has been a football official in the Southeastern Conference for 25 years and worked a full schedule of top SEC games every year as head referee. Dick has served as Chief Referee and President of the SEC. He officiated fifteen major bowl games and the SEC Championship game.

His last game on the field was as the head referee for the National Championship Rose Bowl game.

He is now an SEC staff advisor on officiating and evaluates officials performance each Saturday from the SEC Command Center.

His book, "You Better Be Right", has reached the #1 Best Sellers list at Barnes & Noble Bookstores.

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#### CONTACT INFORMATION:

**Michelle Currie** (M) 508.789.8102  
mcurrie@CurrieManagement.com

**Robert Currie** (M) 508.450.3601  
rpcurrie@CurrieManagement.com

**Robin Currie** (M) 781.223.6347  
robin@CurrieManagement.com

**Jim Henderson** (M) a774.545.5184  
jhenderson@CurrieManagement.co

**Matthew Hicks** (M) 508.769.8215  
service@CurrieManagement.com

**George Russell** (M) 847.219.7252  
grussell@CurrieManagement.com

**John VanDeusen** (M) 603.732.3069  
jvandeusen@CurrieManagement.com

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**www.CurrieManagement.com**

# WEDNESDAY, NOVEMBER 8, 2017

7am – 8am

**Breakfast – Bluefire Grille**

8am – 9:30am

## **Plenary Session: Creating a Customer and Employee Experience**

Irving Lecture Hall

The Customer Experience revolves around responsiveness (continuous communication with customers). When customers need repair services because of a piece of equipment not operating, they exhibit anxiety over a multitude of questions that run through their mind. What is wrong? How much will it cost? Will the repair work? The Customer Experience attempts to answer all these questions at the appropriate time; since customers' questions change over time, responses need to change over time – that is the heart of continuous communication.



Presented by *Joshua T. Laurent*, a Fixed Operations Development Consultant and CEO of Straight 6 Business Development Group, LLC. Joshua specializes in developing dealerships seeking to obtain the highest levels of Service performance. After spending over 15 years working in service on both the retail and OEM side for brands such as Mercedes Benz, BMW, Harley Davidson, Snap-on Tools, and Bobcat, Joshua knows what truly drives service profitability, customer/technician retention and management development—and it's not mastering the service flavor of the week. It's how well you build your team, define your strategies, and execute your plans.

9:30am – 10am

**Break & Networking**

10am – Noon

**Choose one of the following Break-Out Sessions:**

### **Keeping up with Technology and the Value of Data**

Sunnyside Room

A data and technology talk covering Currie principles on data and accountability. You will gain straight-forward ways to get higher profitability, growth, and customer satisfaction. Discover opportunities and threats around effectively utilizing, or not utilizing your core DMS/ERP/CRM systems and newer technologies. You'll walk away knowing 2 simple things you can implement immediately and 2 things that might keep you up at night.

Presented by *Jim Henderson, Executive Partner, Currie Management Consultants*. Jim's career has been focused on using systems engineering, data, and technology to improve companies – from the maintenance and parts of military systems to industrial distribution and equipment dealers today. Along the way, he co-founded and ran a reseller/integrator that made the Inc 500 as one of America's fastest growing companies. He's been running best practice groups, coaching, and consulting for the past 11 years. Originally from Indiana and a graduate of Clemson, he now lives in Massachusetts with his wife and 2 boys.

### **Evolving Leadership Roles as Companies Grow**

Elm Room

This workshop will bring you through the evolution of a first-time manager to an owner/investor. Understanding the behaviors, knowledge, and skills necessary at each phase of management is critical to achieving results. You will leave this interactive workshop with a better understanding of your strengths and weaknesses as a manager and leader and what to do to improve.

*Michelle Currie, MA, Principal of Currie Management Consultants* will take you through this impactful workshop. Michelle is a skilled workshop leader on topics such as situational leadership, business communications, assertiveness, team building, sales management, aftermarket management, achieving financial model results, and more. Michelle also works in Currie Management Consultants' traditional areas, creating benchmark development programs, market analyses, pricing strategies, and management development programs.

Noon

**Noon – Irving Lecture Hall**

Closing Remarks

**A recap of the Summit and a call to action.**

***Leadership – Networking – Growth – Operational Excellence***