

# Agenda: Nov 2024



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## FE214

### DoubleTree by Hilton

2050 Gateway Place  
San Jose CA 95110  
P: 408-453-4000

**Meeting Room:** San Martin and San Simeon

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#### **Monday, November 4, 2024**

8:00 AM – 12:00 PM Meeting  
12:00 PM – 1:00 PM Lunch—Catered to Meeting Room  
1:00 PM – 5:00 PM Meeting  
6:00 PM – 8:00 PM Dinner Vito Trattoria

#### **Tuesday, November 5, 2024**

8:00 AM – 12:00 PM Meeting  
12:00 PM – 1:00 PM Lunch—Catered to Meeting Room  
1:00 PM – 5:00 PM Meeting  
6:00 PM – 7:00 PM Dinner Poor House Bistro  
7:00 PM – 9:00 PM San Jose Sharks Hockey

#### **Wednesday, November 6, 2024**

8:00 AM – 11:00 AM Meeting

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Highly detailed and sensitive operational information will likely be shared at this meeting. Let us be reminded of the confidential nature of the information and the importance of compliance with the antitrust laws. Our purpose is to enhance the performance of each group Member's operations through individual decisions and actions of each Member. There are to be no agreements, oral, tacit, or otherwise, by which coordinated or cooperative actions are to be taken, whether in connection with buying or selling either goods or services. Similarly, though we may discuss manufacturers and their practices, no concerted or cooperative action, other than expressing our views on a subject, is to be taken.

## Moderator and Client Support Team

**Scott Hamilton**

860-591-6247

Moderator

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**Kayla Triebwasser**

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Support Specialist

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**Shontelle Johnson**

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Meeting Specialist

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## Executive Committee

**Jay Perrin**

**Matt Pell**

**Andrew Towes**

Chairperson

Senior Co-Chairperson

Junior Co-Chairperson

**Group Listserv**

[214@group.ncmassociates.com](mailto:214@group.ncmassociates.com)

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## Composite Run Date

The group-requested mandatory run date for your composite is the **20th of every month\***.

\*The group or the NCM team may select a run date before/after the mandatory monthly run date to use current data for a meeting composite. The deadline will be communicated to the group if it is running earlier or later than normally scheduled.

## Attendance Chart

#	Member First and Last Name	Feb 2024	July 2024	Nov 2024	Click or tap here to enter text.	Click or tap here to enter text.
1	Kyle Schilter Powersports Company	X	X	X		
2	Jason Wentland Pillar Equipment	X	X	X		
3	Ben Vliet Evergreen Tractor		X	X		
4	Charlie Lavender Deviney Equipment	X	X	X		
4	Johnathan McMillian Deviney Equipment					
5	Andrew Toews PowerQuip Inc	X	X	X		
5	Benson Toews PowerQuip Inc			X		
6	Chad Hochstetler Ricareall Farm Supply Inc.	X	X	X		
7	Jeff Speno Mission Valley Tractor		X	X		
8	Jon Wolf Okawville Equipment	X	X	X		
8	Cody Whitworth Okawville Equipment	X		X		
9	Mark Waldorff Gatorland Kubota Equipment Co	X	X	X		
9	Valeri Waldorff Gatorland Kubota Equipment Co	X				
9	Davis Waldorff Gatorland Kubota Equipment Co			X		
10	John Gilliam Floyd's Kubota	X		X		
10	Kevin Pereira Floyd's Kubota	X	X	X		
10	Cody Bohl Floyd's Kubota		X			
11	Steve Funk F&W Equipment	X	X	X		
12	Scott Dounn--Visitor Kubota of Denver			X		
12	Matthew Howard-Visitor Kubota of Denver			X		

13	Matt Pell Pell's Farm Service	X	X	X		
15	Jay Perrin Perrin Farm Equipment	X	X	X		
15	Chuck Perrin Perrin Farm Equipment	X	X	X		

## Meeting Checklist

- ☐ Laptop Computer as will be using Reports On-line
- ☐ 20 Group Binder
- ☐ I've Got a Problem issue for Group discussion

## Monday, November 4, 2024

### 8:00 AM **WELCOME & CONFIDENTIALITY**

- Confidentiality Reminder by Chair and Moderator
- Review any Bylaw Violations
- Review Agenda
- List "I've Got a Problem" Topics

### 8:30 AM **HOW'S BUSINESS**

Goal: To get a gut feeling about what the marketplace has been like since the group last met. What is happening at your dealership.

### 9:30 AM **BREAK**

9:45 AM	<b>CONTINUE HOW'S BUSINESS</b>
10:30 AM	<b>REVIEW INDUSTRY TRENDS – WHAT TRENDS ARE WE SEEING IN THE INDUSTRY</b>
11:00 PM	<b>BREAK</b>
11:15 PM	<b>REVIEW NUMBERS – IDENTIFY OPPORTUNITIES FOR MY ORGANIZATION</b>
12:00 PM	<b>LUNCH</b>
1:00 PM	<b>CONTINUE TO REVIEW NUMBERS</b>
2:15 PM	<b>BREAK</b>
2:30 PM	<b>I'VE GOT A PROBLEM DISCUSSIONS</b>
3:00 PM	<b>KUBOTA MANAGEMENT DISCUSSION – ROUND TABLE Q&amp;A SESSION</b>
5:00 PM	<b>ADJOURN</b>
5:45 PM	<b>MEET IN THE LOBBY FOR DINNER AT VITO TRATTORIA - 90 SKYPORT DR, SAN JOSE</b>

## Tuesday, November 5, 2024

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<b>8:00 AM</b>	<b>PREPARE FOR HOST VISIT</b> <ul style="list-style-type: none"><li>• Financial Review</li><li>• Host to provide detailed information on their company and provide guidance on areas of concern</li><li>• Break into teams</li></ul>
<b>8:45 AM</b>	<b>TRAVEL TO MISSION VALLEY TRACTOR &amp; EQUIPMENT</b> <ul style="list-style-type: none"><li>• 780 E Brokaw Rd San Jose, CA 95112</li></ul>
<b>9:00 AM</b>	<b>TOUR OF MISSION VALLEY TRACTOR &amp; EQUIPMENT</b>
<b>9:30 AM</b>	<b>MEET AS TEAMS TO EVALUATE DEPARTMENTS</b>

- Discovery on Culture, People, Processes and Strategy for each dept
- Discovery on issues requested by host dealer

**11:00 AM TRAVEL BACK TO DOUBLETREE BY HILTON**

**11:15 AM GROUPS MEET TO PREPARE EVALUATION**

- Each team to write up Top 3 opportunities on flip chart to set Objectives for host. Be prepared to present Top 3 things for each dept that were positive or things we liked.

**12:00 PM LUNCH**

**12:30 PM DEALERSHIP EVALUATIONS BY TEAMS**

Goal: Teams review their findings, both good and bad, with host dealer. Team leader to give narrative, other team members then add any additional information. No redundancy.

**1:30 PM BREAK**

**1:45 PM HOST RESPONSE TO EVALUATION**

- Host dealer should respond to points raised, questions asked and discuss how Top 3 will be implemented

**2:30 PM REVIEW OBJECTIVES FROM PREVIOUS MEETING**

Goal: Determine if each member achieved their objective set at previous meeting.

- Each member must prove they met objective with any issues decided by Chair.

**3:00 PM MARKETING PRESENTATION – MISSION VALLEY TRACTOR & EQUIP.**

**4:00 PM BREAK**

**4:15 PM I'VE GOT A PROBLEM – PARKING LOT**

**5:00 PM ADJOURN**

**5:15 PM MEET IN LOBBY FOR DINNER AT POOR HOUSE BISTRO – 317 W ST. JOHN ST., SAN JOSE**

**7:00 PM SAN JOSE SHARKS HOCKEY GAME – SAP ARENA**

## Wednesday, November 6, 2024

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**8:00 AM      WELCOME & CONFIDENTIALITY – CHAIRMAN & MODERATOR**  
Confidentiality Reminder by Chair and Moderator

**8:05 AM      ROUND TABLE – TOPICS SELECTED BY COMMITTEE**

**9:45 AM      SET OBJECTIVES FOR NEXT MEETING**

**10:30 AM     KUBOTA OF DENVER (VISITOR) REVIEW AND Q &A**

**10:45 PM     HOUSEKEEPING**

- Confirm meeting dates and set for November 2025
- Complete Meeting Survey's
- Vote on Kubota of Denver - Visitor

**11:00 AM     MEETING WRAP-UP AND ADJOURN**

**Safe Travels home, Scott Hamilton**