



2018 FISA ANNUAL CONFERENCE

RIDING THE WAVES OF CHANGE

SEPTEMBER 15-18, 2018
LAGUNA CLIFFS MARRIOTT RESORT & SPA
DANA POINT, CALIFORNIA



NETWORKING › EDUCATION › CONNECTING

FISA 2018 ANNUAL CONFERENCE

WELCOME



Fellow FISA Members,

This year's conference line-up and location are phenomenal. "Riding the Waves of Change" is a great title given our rapidly changing business environment and of course, the ocean-side location.

The relevant content will be presented by industry experts and dynamic speakers. Topics include: Economy, Hiring / Retaining employees, Leadership, Communication, and Maintaining Value in the age of Amazon.

This will be my first visit to Dana Point, CA. The resort appears to be an excellent place for us to do our networking which is a key component when placing a value on attending. Reestablishing business relationships and meeting new people is an important part of each FISA conference. One measure of success for a conference is to have a member say he/she met someone, learned about their business, and now they are working together. Creating relationships and strengthening the distribution channel is central to FISA's purpose.

If you are a new FISA business member, be sure to stay for the entire conference and bring your wife, husband, or partner. This is truly an integrated work/home life experience that you will both enjoy. First-timer's are particularly welcomed, and you will find the FISA Board of Directors engaged in introducing you to the Association.

If you are a returning FISA attendee, you know the professional development that this conference offers and we urge you to consider inviting a new employee to attend with you.

Stay competitive and come join me at this year's FISA conference.

Kind regards,

Yvonne O'Brien, Tel-Tru Manufacturing
2018 Conference Chairman

REGISTRATION INCLUDES

- All Meeting Materials
- Three Breakfasts & Receptions
- Monday Evening Cocktails/Dinner
- One Guest Breakfast

THINGS TO KNOW

Dress in comfortable resort attire. Collared shirts for the men and slacks, bermudas, or skirts for the ladies would be appropriate. Monday night's dinner at the Dana Point Yacht Club is very casual, not dressy cocktail attire. Temperatures in September range from 79 degrees in the day to 58 degrees in the evenings.



TRANSPORTATION

John Wayne International Airport in Orange County, California, is located approximately 26 miles from Dana Point. Rental cars are available or shuttle service through Super Shuttle at (800) 200-6655 or www.supershuttle.com. Uber and taxi service are other transportation options. Overnight parking at the Laguna Cliffs Marriott Resort & Spa is our discounted rate of \$25 per night.

2018 FISA ANNUAL CONFERENCE AGENDA

FRIDAY, SEPTEMBER 14

- 4:00 pm – 5:00 pm Conference Committee
- 5:00 pm – 6:30 pm Board of Directors Meeting

SATURDAY, SEPTEMBER 15

- 8:30 am FISA Golf Tournament at Monarch Beach Golf Links
- 10:30 am – 2:00 pm Tour of Mission San Juan Capistrano
- 11:30 am – 4:00 pm Sport Fishing
- 5:00 pm – 6:00 pm First-Timer's Meeting
- 6:00 pm – 7:30 pm Cocktail Reception/Dinner on your own

SUNDAY, SEPTEMBER 16

- 7:30 am – 8:15 am Breakfast & Program
- 8:30 am – 9:45 am Spouse/Guest Breakfast
- 8:30 am – 10:00 am **Go from A to THE: Stop Being A Leader. Start Being THE Leader!** – Ryan Avery
- 10:30 am – 12:00 pm **Hiding in Plain Sight: Attracting the Talent You Need** – Nancye Combs
- 12:30 pm – 4:00 pm Tour of Mission San Juan Capistrano
- 12:30 pm – 3:30 pm Walking Tour of Historic Dana Point
- 12:45 pm – 3:00 pm Whale Watching
- 6:00 pm – 7:30 pm Cocktail Reception/Dinner on your own

MONDAY, SEPTEMBER 17

- 7:30 am – 8:15 am Breakfast & Program
- 8:30 am – 10:00 am **A Curve in the Road** – Brian Beaulieu
- 10:15 am – 12:00 **Reinvent Your Value in the Age of Amazon** – Bruce Merrifield
- 12:30 pm – 2:30 pm Sailing on the Curlew
- 12:30 pm – 3:30 pm Kayaking
- 12:45 pm – 3:45 pm Headlands Walk
- 1:00 pm – 3:45 pm Stand Up Paddle Boarding
- 3:00 pm – 5:00 pm Sailing on the Curlew
- 6:30 pm Cocktails/Dinner at Dana Point Yacht Club

TUESDAY, SEPTEMBER 18

- 7:30 am – 8:30 am Breakfast & FISA Annual Meeting/Everyone Invited
- 8:45 am – 9:30 am Board of Directors Meeting

ABOUT THE RESORT

Nestled high on a bluff overlooking the Pacific Ocean, the Laguna Cliffs Marriott Resort & Spa is a AAA Four Diamond Resort. Set among lush gardens and sweeping lawns, there are numerous outdoor venues to enjoy the Southern California climate. Experience their premier spa or relax by one of the outdoor pools and take in the ocean views. The casually sophisticated atmosphere of the Resort lends itself to networking in a relaxed environment.



DANA POINT, CA

Dana Point is a community filled with a rich and vibrant history. Today specialty shops and restaurants dot the landscape in town and around the harbor where a 2,500 slip marina is a focal point. Dana Point gained its fame in the 1950s as a prime destination for surfers with the opening of California's first surf shop in 1954. With mentions in several Beach Boys songs, Dana Point became a destination.

SEPTEMBER 15–18 • RIDING THE WAVES OF CHANGE



Go From A to THE: Stop Being A Leader. Start Being THE Leader! – Ryan Avery

Learn what differentiates A leader from THE leader and the strategies we need to know when switching from A to THE in our industry. It is no longer acceptable for us to go from good to “great” when we want to persuade others to take action and stand apart from our competition. Our competition is great. Their products are great. It is time to Go From A to THE® in our industry! Ryan Avery teaches the top strategic communication skills, storytelling strategies and insights the world’s best leaders and sellers use to get people to take action! After Ryan’s presentation, leave knowing:

- The major differences between what it means to be A vs. THE in your industry and how to make the switch
- The communication strategies top leaders use to engage, motivate and get others to take action
- The most powerful storytelling strategies leaders use to persuade and retain their customers

RYAN AVERY is one of the millennial generation’s most profound speakers on generational leadership and strategic communication. At age 25, Ryan became the youngest World Champion of Public Speaking in history, competing against more than 30,000 contestants from 116 countries to claim the 2012 World Championship for Toastmasters International. He has delivered keynotes and training sessions on the power of strategic communication and corporate storytelling on every continent in the world, is an Emmy-award winning journalist, and a two-time best-selling author.



Hiding in Plain Sight: Attracting the Talent You Need – Nancy Combs

There are more Millennials at work today than Boomers, so why can’t you find them and tap into the best among them? Workforce attraction has evolved along with the needs and wants of this newest generation where 75% of Millennials will be in the workplace next year and Generation X is becoming more elusive than ever.

There are a few things you need to know to effectively attract and retain high performers:

- Where you should look for the best and brightest—technical, sales and IT.
- How to make certain your job solicitation catches their eye—What’s in it for ME?
- What version of Tinker Toys and Lincoln Logs makes working for you appealing—avoiding antiques and stone-agers.

Job prospects are sensitive to every aspect of your operation, including how you pay and the message your culture sends to employees. From this session, you will leave with methods to find the Top Talent you need, how to pay them, and provide a workplace and other rewards that will affect retention.

NANCY COMBS fits the classic definition of a “thought leader.” Hiring and retaining talent is a big issue for FISA companies and Nancy will show you the contemporary way to assure you find and retain top talent. She is a trusted advisor, remarkable educator, gifted speaker and a voice of authority on Human Resources and Organizational Management. She is President and CEO of HR Enterprise, Inc., in Louisville, KY and spent many years as a corporate business executive before founding a consulting practice. Nancy is the retained consultant for many trade associations and the endorsed HR consultant for FISA.



A Curve in the Road – Brian Beaulieu

2018 is almost in the history books so we will focus on what the leading indicators are saying about the economy for 2019. There are business cycle changes that are reshaping the future and there are policy actions that will have an impact on our future - and others that won't. The consumer drove the economy to where it is today. Attend and find out why we think the consumer could be in a weakened position for 2019. The savings rate, stock market, incomes, and interest rates all have a part to play in the outlook. Attend and you will take home:

- Confidence in knowing what the future holds
- Which leading indicators to follow
- Potential policy influences on the economy (or lack thereof)
- When the next rising trend will take hold
- Threats to your profit margins
- Risks to the forecast

BRIAN BEAULIEU has been an economist with ITR Economics since 1982 and its CEO since 1987. He is also Chief Economist for TEC, a global organization comprised of over 13,000 CEOs. At ITR, Brian has been engaged in applied research regarding business cycle trend analysis and the utilization of that research at a practical business level. For the past 25 years, he has been giving workshops and seminars across the US and Canada to thousands of business owners and executives. ITR Economics has a long-term 94.7% accuracy rating in forecasting major economic events.



Reinvent Your Value in the Age of Amazon – Bruce Merrifield

Amazon (AMZ) is continually pushing the boundaries of innovation. Following their ever-evolving methods for consuming channel volume is a full-time job. Depending on your perspective, AMZ has become your friend, your foe, maybe even your partner. However, one thing is for sure across the board: Amazon should be your role model.

By 2021, Amazon (AMZ) will be the first-stop for everyone’s B2B product—discovery, learning, shopping, buying—journey. Amazon is changing the way we think with customer expectations for easy ordering, fast and reliable shipping, easy returns, and exceptional service. For FISA members, this may reduce some traditional selling value and commodity sales. But, it will also make new value innovations possible. Attend this session to start thinking about what new, total value bundle your company can deliver in a real-time, digital information world.

BRUCE MERRIFIELD is a former owner of a distribution business, a consultant, an author, and in the past two years, he has been the foremost student and reporter on how Amazon will increasingly challenge B2B channels. Well-known in distribution channels, his weekly blogs posted on both his web site and LinkedIn are pithy and provocative. Bruce started his consulting practice in 1980. He has been a prolific writer and his book “Electronic Commerce for Distribution Channels” published by NAW in 1999 went through three printings. Bruce is a frequent speaker to more than 100 trade associations and many global 1000 corporations.

2018 FISA CONFERENCE ACTIVITIES

PLEASE NOTE: The number in parentheses after an activity is the maximum capacity for that activity.

SATURDAY, SEPTEMBER 15

FISA GOLF TOURNAMENT (60)

8:30 am • \$250.00 • Includes transportation, green fees, cart, box lunch, tax & gratuity.



Few California golf resort experiences can match the blend of stunning natural beauty and the variety of challenges presented at Monarch Beach Golf Links. Here, along the dramatic bluffs overlooking the Pacific Ocean in Southern California, master golf architect Robert Trent Jones, Jr., has fashioned a one-of-a-kind par-70 golf course design – challenging and fair, with commanding & sweeping views of the sea and beyond. Enjoy the camaraderie of a FISA Captain's Choice tournament with a shotgun start.

TOUR OF MISSION SAN JUAN CAPISTRANO (55)

10:30 am – 2:00 pm • \$127.00 • Includes transportation, guide, admission to Mission, lunch, tax & gratuity.



Mission San Juan Capistrano, well known as “the jewel of the missions” and founded in 1776 is considered to be the oldest mission in the state and once the most prosperous. It has traditional Spanish architecture and lush gardens. Take a step back into the rich history of California and experience life as it

was during the era when the Franciscan Missions flourished and shaped California's future. Enjoy a lunch of fresh Mexican food and the charming ambiance at El Adobe Restaurant.

SPORT FISHING (30)

11:30 am – 4:00 pm • \$175.00 • Includes transportation, captain and crew, rod rental, fishing license, lunch, tax & gratuity.

What better way to network than spend a half day on the water catching fish and enjoying the beautiful California coast on a FISA privately chartered 60' boat? Last year in mid-September, the catch included calico bass, sheep head, white fish and rock fish. Your trip is booked through Dana Wharf, a family owned company operating since 1971 out of Dana Point Harbor.

SUNDAY, SEPTEMBER 16

WHALE WATCHING (100)

12:45 pm – 3:00 pm • \$105.00 • Includes transportation, guide, lunch, charter boat, tax & gratuity.



Dana Point is known as the whale capital of the West so it's no wonder that first-time visitors to the area put a whale watching adventure on the top of their to do lists. FISA has chartered the Dana Pride, a 95' vessel with seating indoors and outside. The interior is air conditioned and has a large flat

screen tv and Women's and Men's restrooms. Last September, in this time period, you could see Humpback, Blue and Minke Whales as well as Risso and Common dolphin. Have lunch, enjoy the scenery and a naturalist is on board to explain the wild life and answer questions.

TOUR OF MISSION SAN JUAN CAPISTRANO (20)

12:30 pm – 4:00 pm • \$127.00 • Includes transportation, guide, admission to Mission, lunch, tax & gratuity

See description of tour under Saturday activity listing.

WALKING TOUR OF DANA POINT (20)

12:30 pm – 3:30 pm • \$75.00 • Includes transportation, lunch, guide, tax & gratuity.

Start with a delicious lunch at Coastal Kitchen, a popular local restaurant in a historic building. After lunch, on the walking tour with members of the Historical Society, you will hear about the fascinating history of Dana Point and walk by some of the historic homes. Learn about the streets with the lantern names and the early development of Dana Point as you enjoy the scenery in this 90-minute walk of approximately a mile and a half.

MONDAY, SEPTEMBER 17

DESIGNED TO ENTERTAIN (50)

10:00 am – 11:00 am • \$30.00 • Includes presentation, beverages, tax & gratuity.

Join us for a unique and inspiring live show on the art of entertaining. It's an hour of wacky fun and fabulously useful information as Lynn Chi-Chi, a professional interior decorator, shows you how to utilize unusual materials to decorate with style.

SAILING ON THE CURLEW (25)

12:30 pm – 2:30 pm • \$110.00 • Includes transportation, lunch, boat charter, tax & gratuity.



The 82' schooner, Curlew, was designed by the famous John G. Alden and launched in 1926 for a member of the New York Yacht Club. She raced in a number of Newport to Bermuda races, was later donated to the U.S. Coast Guard Academy and had quite an interesting history before being acquired by her present owner and moving to Dana

Point Harbor. Now, you can sit back, enjoy having the owner and crew take you on a delightful sail in the Pacific on this classic yacht.

SAILING ON THE CURLEW (25)

3:00 – 5:00 • \$85.00 • Includes transportation, drinks, snacks, boat charter, tax & gratuity.

See above description. No lunch, but enjoy drinks & snacks on this classic yacht.

STAND UP PADDLE BOARDING (18)

1:00 pm – 4:00 pm • \$100.00 • Includes transportation, lunch, instructor and two-hour rental, tax & gratuity.

It's less than a ten-minute ride to get to the harbor and beautiful Baby Beach, your headquarters for an afternoon of fun on the water. If you've never been stand up paddle boarding, here's your chance to have an instructor teach you the basics, and you can practice in a protected area of the harbor. If you're an experienced paddle boarder, venture out around the harbor and around the marina enjoying the scenery.

KAYAKING (28)

12:30 pm – 3:30 pm • \$100.00 • Includes transportation, lunch, instructor and two-hour rental, tax & gratuity.

Ten single kayaks and nine tandems are available. After finishing your box lunch, your kayaking starting point is on nearby Baby Beach where your instructor/guide will get you oriented and lead you on a scenic tour of Dana Point harbor to get close up views of the scenic 2,500 slip marina.

HEADLANDS WALK (20)

1:00 pm – 4:00 pm • \$75.00 • Includes transportation, guide, admission to NIC Center, tax & gratuity.

You'll have lunch at The Point Restaurant that's a favorite of the locals and then head for a nature preserve on the bluff at the very tip of Dana Point. This is the point that gives the city its name and from here you'll have gorgeous views of the harbor and the Pacific Coastline. A knowledgeable guide leads you through the trails talking about the local flora and fauna. Have a stop at the Interpretive Center. This is not a strenuous walk and will cover about a mile and a half in 90 minutes.