



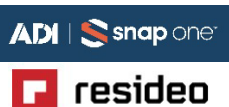


Renaissance Des Moines Savery Hotel

AGENDA

Monday, September 15, 2025		Room
4:00 – 6:00	<u>Operations</u> : Ice breaker + expectations for the event and one item for discussion <u>Technology</u> : Ice breaker + Idea Exchange: (1) What are you working on, (2) want to learn about, and (3) your One Good Idea to share?	Ops – Savery I Tech – Savery II
6:00 – 8:00	Reception & Dinner <i>Sponsored by:</i> 	Des Moines & Iowa
Tuesday, September 16, 2025		
7:00 – 8:00	Breakfast <i>Sponsored by:</i> 	Des Moines
8:00 – 8:15	Opening Remarks – Scott Elkins & Ron Rosenbaum	Iowa
8:15 – 9:45	General Session: <i>State of the Industry</i> , Michael Barnes , Barnes Associates	Iowa
9:45 – 10:00	Break	
10:00-11:30	General Session: <i>Tariffs, Inflation, and trends we're seeing in the Market</i> , Adam Echter , Partner, Simon-Kucher & Author of " <i>Beating Inflation</i> " & Eric Flato , Senior Director, Simon-Kucher	Iowa
11:30-12:30	Lunch <i>Sponsored by:</i> 	Des Moines
12:45 – 2:00	Fireside Chat : Moderator: John Cannon Panelists: Paul Ridder , Zeus Fire & Security – Sean Forrest , Alarm Detection Systems – Darren Brown , Guardian Alarm – Michael Barnes and Eric Flato	Iowa
2:00 - 2:15	Break	
2:15 – 4:00	**Board Work Session	Capitol
2:15 – 4:00	<u>Operations</u> : Video Trailers - Anthony Sharpy/Steve Butkovich/Matt Melk; Fire Sales Expertise - Jose Mieles; Technician Development and Performance Incentives - Ethan Newberry; WIP Meetings – Chad Breheny/Ethan Newberry <u>Finance</u> : Group discussion on current challenges; Breakout tables by topics (ERP transitions, sales automation, CRM systems, financial data security) <u>Technology</u> : Idea Exchange (continued) (1) What are you working on, (2) want to learn about, and (3) your One Good Idea to share?	Ops – Savery I Finance – Savery II Tech – Iowa
4:00 – 4:15	Break	
4:15 – 5:15	General Session: <i>AI in Security: Risk, ROI, or Revolution – Panel Discussion</i> . Presenter & Moderator: Priya Serai , Zeus Fire & Security - Panelists: Scott Elkins , Zeus Fire & Security – Daniel Oppenheim , DGA Security Systems – Brent Uhl , Guardian Alarm	Iowa
6:00 – 8:00	Reception & Dinner <i>Sponsored by:</i>  	Des Moines & Iowa

Renaissance Des Moines Savery Hotel

AGENDA

Wednesday, September 17, 2025			Room
7:00–8:00	Breakfast	<i>Sponsored by:</i> 	Des Moines
8:00–8:45	Brian Duffy & Mike Meridith – Per Mar Security Services & SEI		Iowa
8:45–10:00	General Session: Jeff Schatten is an Associate Professor of Business Administration at Washington and Lee University, where his research and consulting explore the intersection of artificial intelligence, organizational behavior, and leadership.		Iowa
10:00–10:15	Break		
10:15–12:00	<u>Operations</u> : Jeff Schatten (10:15-11AM); Open discussion topics: Service and Inspection Software, System Design, Job Docs, QTE Approvals, Sales Handoff, Project Management Software/AI <u>Finance</u> : Planning for AI in financial operations; Jeff Schatten (11:15-12) <u>Technology</u> : Video monitoring technology – Anthony Sharpy		Ops – Savery I Finance – Savery II Tech - Iowa
12:00–1:00	Lunch	<i>Sponsored by:</i> 	Des Moines
1:15–2:30	General Session: “Legal implications of AI” and “TCPA and Communications from Alarm Companies” - Mark Pezold , DGA Security		Iowa
2:30–2:45	Break		
2:45–4:00	**Shareholder Meeting		Iowa
2:45–4:00	<u>Operations</u> : AI Tools in Operations; Wrap-up and planning future virtual meetings <u>Finance</u> : Grouped Chats + Roundtable: Informal, small-group discussions on cross-functional finance challenges. Reflect on earlier sessions and identify topics for future virtual meetings. <u>Technology</u> : Cyber Security presentation and Interactive Scenarios – Jared Reeves		Ops – Savery I Finance – Savery II Tech – Des Moines
4:00–4:15	Break		
4:15–5:15	Closing Panel Session: <i>Industry Leaders – Forecasting the Future</i> Moderator: Scott Elkins , CEO Zeus Fire & Security, (NetOne Chairman), Steve Butkovich (TMA President), Kevin Stone (ESA Chairman), Tim Westphal (Past President CAA/NetOne Board Member), John Sullivan (SVP Strategic Accounts, ADI/SnapOne)		Iowa
6:00–8:30	Reception & Dinner: (2 block Walk to Des Moines Embassy Club)	<i>Sponsored by:</i>   	Des Moines Embassy Club Downtown 666 Grand Ave, 34th Fl

Thursday, September 18, 2025 – Departures



Renaissance Des Moines Savery Hotel

AGENDA

SESSION DESCRIPTIONS AND/OR BIOS

Jeff Schatten is an Associate Professor of Business Administration at Washington and Lee University, where his research and consulting explore the intersection of artificial intelligence, organizational behavior, and leadership. With a Ph.D. in Management from Georgia State University, Jeff collaborates with organizations to design and implement AI strategies that transform management, decision-making, and workplace dynamics. His consulting and speaking engagements guide executives and private equity firms in navigating the cultural and operational challenges of AI adoption, turning technological potential into actionable strategies.

Jeff is the author of *AI Will Take Your Job (and It's for the Best)*, a book blending optimism and pragmatism to explore AI's impact on work and society. Written during a year in Barcelona—where he dabbled in stand-up comedy—the book offers a sharp, accessible vision for an AI-driven future. His thought leadership appears in *The Chronicle of Higher Education*, *The LA Times*, and *The Big Story* podcast, while his academic work, published in journals like *Leadership Quarterly* and *Negotiation Journal*, has earned accolades such as the Southern Management Association's Best Paper in Organizational Behavior.

As host of the *Demystifying Organizations* podcast, Jeff interviewed leading voices on management and innovation. He teaches a distinctive "Leading Teams" course, pairing students with incarcerated individuals to study leadership in challenging contexts. With a philosophy degree from the University of Maryland, experience founding a real estate investment firm, and advising startups in South Africa, Jeff brings a multidisciplinary lens to his work. He helps leaders not only understand AI's mechanics but also its profound implications for human agency and organizational life.

Adam Echter

Adam Echter is a Partner with Simon-Kucher and leads the Global Industrials Sector. Adam's career is marked by a deep commitment to enhancing sales excellence, business model innovation, and strategic pricing across various industries. With a rich background in sales development—from grassroots outside sales to the comprehensive restructuring and empowerment of sales teams—his expertise has impacted industrial companies with revenues ranging from \$100 million to several billion dollars.

Such experience and success have led to recognition as one of "The Top 25 Strategy Consultants and Leaders of 2023" by the Consulting Report.

An author of note, Adam co-authored "[Beating Inflation](#)" alongside Dr. Hermann Simon, a best-selling author and co-founder of Simon-Kucher. This work underscores his thought leadership in the field of pricing during economically volatile times. Moreover, his contribution to the speaker circuit has delivered valuable insights through the Professional Pricing Society, Chief Executive Group, Private Equity International and various industry/academic forums.

Adam holds a bachelor's degree in mechanical engineering from the University at Buffalo and an MBA in finance from the University of Rochester's Simon School of Business. Notably, his commitment to education and mentorship led him back to the Simon School of Business to help develop the first comprehensive pricing degree formally recognized by any MBA program.