



| Central | Session | Monday, October 18, 2021 | | |
|---------|---------|--------------------------|--------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | 3:00 PM | Joint | Hotel Check In | Omni Hotel |
| 5:30 PM | 8:30 PM | Joint | Reception - Heavy Appetizers and Cocktails | Dealers + Spouses El Capistrano, Pool Side |
| 6:30 PM | | Joint | Welcome | Terran Segura; Yori Escalante, Holt CAT Paul Hensley; Tony Shedrock, Holt CAT Martinez, Empire CAT ; Matt Weber, Butler CAT Nancy Romance, Ohio CAT; Andy Mickelson, Ziegler CAT Marcus El Capistrano, Pool Side |

| Central | Session | Tuesday, October 19, 2021 (7 hours content) | | |
|----------|----------|---------------------------------------------|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| 6:30 AM | 7:45 AM | Joint | Breakfast | Dealers + Spouses Iberian Ballroom |
| 7:45 AM | 8:20 AM | Joint | What Everyone at NACDPFG should know about CATD... but may have been afraid to ask | Shellie McCain, CATD Iberian Ballroom |
| 8:20 AM | 8:35 AM | Joint | How can you help CATDPC? | Jan Franzen, Wheeler CAT Iberian Ballroom |
| 8:35 AM | 8:50 AM | Joint | Knowledge Hub - SharePoint Navigation | Nancy Romance, Ohio CAT Iberian Ballroom |
| 8:50 AM | 9:00 AM | Joint | Break | NACD Fleet/Procurement to Separate Rooms |
| 9:00 AM | 9:15 AM | Separate | Welcome and Introductions | Nancy Romance, Ohio CAT Mickelson, Ziegler CAT Andy Veramendi |
| 9:15 AM | 10:00 AM | Separate | CATDPC Agreements and Projects | Team CATDPC Veramendi |
| 10:00 AM | 10:45 AM | Separate | Terms and Conditions - What are you really signing? | Shellie McCain, CATD Veramendi |
| 10:45 AM | 11:00 AM | Separate | Break | |
| 11:00 AM | 11:30 PM | Separate | Change Management - Beyond the Why | Jan Franzen, Wheeler CAT Veramendi |
| 11:30 AM | 12:30 PM | Joint | Lunch | Dealers Only Iberian Ballroom |
| 12:30 PM | 2:30 PM | Separate | Quick Wins - Cost Savings and Process Improvements Share | Denise Carroll, Thompson Machinery Veramendi |
| 2:30 PM | 2:40 PM | Joint | Break | |
| 2:40 PM | 2:50 PM | Joint | Vendor Round-Up (Roundtables) Instructions | Dealers: Andy Mickelson, Ziegler CAT Sponsors: Claude Williams III, Gregory Poole CAT Iberian Ballroom |
| 2:50 PM | 3:50 PM | Joint | Vendor Round-Up (Roundtables) | Dealers & Round-Up Sponsors Iberian Ballroom |
| 3:50 PM | 4:00 PM | Joint | Break | |
| 4:00 PM | 5:00 PM | Joint | Vendor Round-Up (Roundtables) | Dealers & Round-Up Sponsors Iberian Ballroom |
| 5:00 PM | 6:00 PM | Joint | Evening Break | |
| 6:00 PM | 7:00 PM | Joint | Cocktails | Dealers + Spouses, & Alamo Sponsors Iberian Ballroom |
| 7:00 PM | 8:00 PM | Joint | Themed Dinner | Dealers + Spouses, & Alamo Sponsors Iberian Ballroom |
| 8:00 PM | 10:00 PM | Joint | Barge rides | Dealers + Spouses, & Alamo Sponsors El Capistrano, Pool Side |

| Central | Session | Wednesday, October 20, 2021 (7 hours content) | | |
|----------|----------|-----------------------------------------------|----------------------------------|------------------------------------------------------------|
| 7:00 AM | 8:00 AM | Joint | Breakfast | Dealers + Spouses & All Sponsors Iberian Ballroom |
| 8:00 AM | 8:45 AM | Separate | Alamo Presentation: Seprio | Dealers & Alamo Sponsor Veramendi |
| 8:45 AM | 8:50 AM | Separate | Break | |
| 8:50 AM | 9:35 AM | Separate | Alamo Presentation: Office Depot | Dealers & Alamo Sponsor Veramendi |
| 9:35 AM | 9:40 AM | Separate | Break | |
| 9:40 AM | 10:25 AM | Separate | Alamo Presentation: Cintas | Dealers & Alamo Sponsor Veramendi |
| 10:30 AM | 10:40 AM | Joint | Load Transport to Holt | NACD Fleet/Procurement, Sponsors |
| 10:40 AM | 11:30 AM | Joint | Transport to Holt CAT | Dealers & All Sponsors Bus |
| 11:30 AM | 12:00 PM | Joint | Lunch (Grab-n-Go or Sit-n-Eat) | Dealers & All Sponsors Tent Outside |
| 12:00 PM | 4:00 PM | Joint | HOLT Campus Tours | Dealers & All Sponsors Holt |
| 12:00 PM | 4:00 PM | Joint | Sponsor Trade Show | Dealers & All Sponsors Holt Parking Lot |
| 3:00 PM | 3:30 PM | Joint | Holt Executive Thank You | Corinna Holt-Richter and Peter J. Holt Holt Parking Lot |
| 4:00 PM | 4:45 PM | Joint | Transport to Hotel | Dealers & All Sponsors Bus |
| 4:45 PM | 5:45 PM | Joint | Evening Break | |
| 5:45 PM | 6:45 PM | Joint | Transport to Rodeo | Dealers + Spouses, & All Sponsors Bus |
| 7:00 PM | 10:00 PM | Joint | Rodeo Event | Dealers + Spouses, & All Sponsors Tejas Rodeo |

| Central | Session | Thursday, October 21, 2021 (8 hours content) | | |
|----------|----------|----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| 6:30 AM | 8:00 AM | Joint | Breakfast | Dealers + Spouses Iberian Ballroom |
| 8:00 AM | 9:00 AM | Separate | Capital Expenditures Discussion: Controls, Processes, Vendor engagement, Warranties, Recognizing Capitalized items, and Tracking tools | Andy Mickelson, Ziegler CAT DiPinto, Foley CAT Joe Veramendi |
| 9:00 AM | 9:45 AM | Separate | Procurement & IT Engagement | Joyce Pingel, Holt CAT Veramendi |
| 9:45 AM | 10:00 AM | Separate | Break | |
| 10:00 AM | 11:00 AM | Separate | Dealership Procurement Process Compliance Challenges | Nancy Romance, Ohio CAT Veramendi |
| 11:00 AM | 12:00 PM | Separate | Vendor management and the RFX process | Heather Black, Western States CAT Veramendi |
| 12:00 PM | 1:00 PM | Joint | Lunch | Iberian Ballroom |
| 1:00 PM | 2:00 PM | Separate | Pcard Spend and Limitations Discussion: Policy, Program Management, How used within your Dealership? | Jeff Evans, Wagner CAT Tedeschi, Carter CAT Kevin Veramendi |
| 2:00 PM | 3:00 PM | Separate | Procurement Operating Systems Breakout - Policy, Process, System Use, Vendor Share with Accounting, etc. | AX Lead: Christa Bockweg, Gregory Poole CAT Lead: Nancy Romance, Ohio CAT Other Lead: Eric Tipton, Carolina CAT Coda Veramendi |
| 3:00 PM | 3:30 PM | Separate | PPE Vending Machine and Keepstock experiences | Kevin Tedeschi, Carter CAT Veramendi |
| 3:30 PM | 4:30 PM | Separate | Open Discussions: Steel, Oil and Lubricants, Packaging, Hydraulic Services, Marketing | Nancy Romance, Ohio CAT Veramendi |
| 4:30 PM | 4:45 PM | Separate | Procurement Wrap Up, Closing Remarks | Nancy Romance, Ohio CAT Mickelson, Ziegler CAT Andy Veramendi |
| 4:45 PM | 5:00 PM | Joint | Wrap, Closing Remarks | Nancy Romance, Ohio CAT Martinez, Empire CAT Yori Escalante, Holt CAT Marcus Terran Segura, Iberian Ballroom |
| 5:00 PM | 5:45 PM | Joint | Evening Break | |
| 5:45 PM | 6:30 PM | Joint | Walk to Alamo, Picture | Dealers + Spouses Alamo |
| 6:30 PM | 9:30 PM | Joint | Walk to Buckhorn Restaurant | Dealers + Spouses Buckhorn |

| Central | Session | Friday, October 22, 2021 (8 hours content) | | |
|---------|----------|--------------------------------------------|-------------------------------|----------------------------------|
| 8:00 AM | 9:00 AM | Joint | Transport to Caterpillar | Dealers + Spouses Hotel |
| 9:00 AM | 11:00 AM | Joint | Caterpillar Seguin Plant Tour | Dealers + Spouses Caterpillar |

Thank you for attending and making this event a success!



**NORTH AMERICAN CATERPILLAR
DEALERS FLEET GROUP**

2021 Fleet Agenda

| Central | | Session | Monday, October 18, 2021 | | |
|---------|---------|---------|--------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| | 3:00 PM | Joint | Hotel Check In | | Omni Hotel |
| 5:30 PM | 8:30 PM | Joint | Reception - Heavy Appetizers and Cocktails | Dealers + Spouses | El Capistrano, Pool Side |
| 6:30 PM | | Joint | Welcome | Terran Segura; Yori Escalante, Holt CAT Paul Hensley; Tony Shedrock, Holt CAT Marcus Martinez, Empire CAT ; Matt Weber, Butler CAT Nancy Romance, Ohio CAT; Andy Mickelson, Ziegler CAT | El Capistrano, Pool Side |

| Central | | Session | Tuesday, October 19, 2021 (7 hours content) | | |
|----------|----------|----------|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------|
| 6:30 AM | 7:45 AM | Joint | Breakfast | Dealers + Spouses | Iberian Ballroom |
| 7:45 AM | 8:25 AM | Joint | What Everyone at NACDFG should know about CATD... but may have been afraid to ask | Shellie McCain, CATD | Iberian Ballroom |
| 8:25 AM | 8:35 AM | Joint | How can you help CATDPC? | Jan Franzen, Wheeler CAT | Iberian Ballroom |
| 8:35 AM | 8:50 AM | Joint | Knowledge Hub - SharePoint Navigation | Nancy Romance, Ohio CAT | Iberian Ballroom |
| 8:50 AM | 9:00 AM | Separate | Break | NACD Fleet/Procurement to Separate Rooms | |
| 9:00 AM | 9:15 AM | Fleet | Welcome and Intro | Martinez, Weber | Madero |
| 9:15 AM | 9:45 AM | Fleet | NACDFG Group Value | Escalante, Lewis | Madero |
| 9:45 AM | 10:00 AM | Fleet | Break | | |
| 10:00 AM | 11:00 AM | Fleet | Fleet Questionnaire - Vehicle and Fleet Info | Lyons, Andersen | Madero |
| 11:00 AM | 12:00 PM | Fleet | Best Practices for Safety and Accident Reporting | Barkus, Sexton | Madero |
| 12:00 PM | 1:00 PM | Joint | Lunch | Dealers Only | Iberian Ballroom |
| 1:00 PM | 1:45 PM | Fleet | Regulatory Update | Escalante/Skloss | Madero |
| 1:45 PM | 2:30 PM | Fleet | OEM Project | OEM Project Team | Madero |
| 2:30 PM | 2:40 PM | Joint | Break | | |
| 2:40 PM | 2:50 PM | Joint | Vendor Round-Up (Roundtables) Instructions | Dealers: Andy Mickelson, Ziegler CAT Sponsors: Claude Williams III, Gregory Poole CAT | Iberian Ballroom |
| 2:50 PM | 3:50 PM | Joint | Vendor Round-Up (Roundtables) | Dealers & Round-Up Sponsors | Iberian Ballroom |
| 3:50 PM | 4:00 PM | Joint | Break | | |
| 4:00 PM | 5:00 PM | Joint | Vendor Round-Up (Roundtables) | Dealers & Round-Up Sponsors | Iberian Ballroom |
| 5:00 PM | 6:00 PM | Joint | Evening Break | | |
| 6:00 PM | 7:00 PM | Joint | Cocktails | Dealers + Spouses, & Alamo Sponsors | Iberian Ballroom |
| 7:00 PM | 8:00 PM | Joint | Themed Dinner | Dealers + Spouses, & Alamo Sponsors | Iberian Ballroom |
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| 7:00 AM | 8:00 AM | Joint | Breakfast | Dealers + Spouses & All Sponsors | Iberian Ballroom |
| 8:00 AM | 8:45 AM | Separate | Alamo Presentation: Cobalt Truck Equipment | Dealers & Alamo Sponsor | Madero |
| 8:45 AM | 8:50 AM | Separate | Break | | |
| 8:50 AM | 9:35 AM | Separate | Alamo Presentation: Sage Oil Vac, Inc | Dealers & Alamo Sponsor | Madero |
| 9:35 AM | 9:40 AM | Separate | Break | | |
| 9:40 AM | 10:25 AM | Separate | Alamo Presentation: Miller Electric | Dealers & Alamo Sponsor | Madero |
| 10:30 AM | 10:40 AM | Joint | Load Transport to Holt | NACD Fleet/Procurement, Sponsors | |
| 10:40 AM | 11:30 AM | Joint | Transport to Holt CAT | Dealers & All Sponsors | Bus |
| 11:30 AM | 12:00 PM | Joint | Lunch (Grab-n-Go or Sit-n-Eat) | Dealers & All Sponsors | Tent Outside |
| 12:00 PM | 4:00 PM | Joint | Sponsor Trade Show | Dealers & All Sponsors | Holt Parking Lot |
| 3:00 PM | 3:30 PM | Joint | Holt Executive Thank You | Corinna Holt-Richter and Peter J. Holt | Holt Parking Lot |
| 12:00 PM | 4:00 PM | Joint | HOLT Campus Tours | Dealers & All Sponsors | |
| 4:00 PM | 4:45 PM | Joint | Transport to Hotel | Dealers & All Sponsors | Bus |
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| Central | | Session | Thursday, October 21, 2021 (8 hours content) | | |
|----------|----------|---------|----------------------------------------------|----------------------------------|------------------|
| 6:30 AM | 8:00 AM | Joint | Breakfast | Dealers + Spouses | Iberian Ballroom |
| 8:00 AM | 8:30 AM | Fleet | Vendor Show/Roundtable Recap | Martinez, Weber | Madero |
| 8:30 AM | 9:15 AM | Fleet | Tire Project | Tire Project Team | Madero |
| 9:15 AM | 10:00 AM | Fleet | APU Project | APU Project Team | Madero |
| 10:00 AM | 10:15 AM | Fleet | Break | | |
| 10:15 AM | 11:00 AM | Fleet | Post-COVID Strategies | Dollard | Madero |
| 11:00 AM | 11:30 AM | Fleet | Manager/Management Vehicles | Anderson | Madero |
| 11:30 AM | 12:30 PM | Joint | Lunch | Dealers Only | Iberian Ballroom |
| 12:30 PM | 1:30 PM | Fleet | Telematics and General Technology Update | Telematics Project Team, Dollard | Madero |
| 1:30 PM | 1:45 PM | Fleet | Break | | |
| 1:45 PM | 4:15 PM | Fleet | Open Discussion - Fleet Wrap Up - Way Ahead | Martinez, Weber | Madero |
| 4:15 PM | 4:30 PM | Fleet | Break | | |
| 4:30 PM | 5:00 PM | Joint | Wrap, Closing Remarks | Martinez, Romance, Holt | Iberian Ballroom |
| 5:00 PM | 5:45 PM | Joint | Evening Break | | |
| 5:45 PM | 6:30 PM | Joint | Walk to Alamo, Picture | Dealers + Spouses | Alamo |
| 7:00 PM | 10:00 PM | Joint | Walk to Buckhorn Restaurant | Dealers + Spouses | Buckhorn |

| Central | | Session | Friday, October 22, 2021 (8 hours content) | | |
|---------|----------|---------|--------------------------------------------|-------------------|-------------|
| 8:00 AM | 9:00 AM | Joint | Transport to Caterpillar | Dealers + Spouses | Hotel |
| 9:00 AM | 11:00 AM | Joint | Caterpillar Seguin Plant Tour | Dealers + Spouses | Caterpillar |

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