



(Agenda as of 6/06/12)

**Tuesday, July 24, 2012**

**Wyndham Hotel  
1260 Euclid Avenue  
Cleveland, OH 44115**

7:00 a.m.-  
8:00 a.m.     **Registration and Breakfast Buffet**

**Location:**  
2<sup>nd</sup> Level Registration/Pre-function Area

8:00 a.m.-  
8:15 a.m.     **Welcome and Opening of the Forum**

**Location:**  
Palace Ballroom

**Speaker**  
Scott Chaikin  
Chair, Middle Market Involvement Committee  
*Greater Cleveland Partnership*  
Chairman and Chief Executive Officer  
*Dix & Eaton*

8:15 a.m.-  
9:15 a.m.     **Plenary Session: “The Market That Moves America”**

The U.S. middle market is the leading indicator of America’s future competitiveness. Consisting of approximately 195,000 U.S. firms with revenues between \$10MM and \$1B, these companies consist of stable, resilient businesses that account for the largest source of sustainable domestic jobs, 1/3 of the country’s total GDP and, if looked at as an individual market segment, the world’s 4th largest global economy.

Dr. Makhija’s presentation will provide meaningful insight on how the middle market is defined, its performance and business outlook, and understanding its unmet needs.

In addition, he will provide attendees with a preview of the

Q2 Middle Market Indicator survey results from middle market executives in areas relating to:

- Company gross revenues performance
- Overall company performance
- Company employment changes
- Expected 12-month gross revenue growth
- Confidence in the global economy, U.S. economy and local economy
- Areas where businesses are most highly challenged
- Where companies would allocate incremental dollars for investment
- Perceptions around access to capital
- Perceptions around the regulatory environment

**Location:**

Palace Ballroom

**Speaker:**

Dr. Anil Makhija

Academic Director, *National Center for the Middle Market*

9:15 a.m.-  
9:30 a.m.

**Networking Break**

**Location:**

2<sup>nd</sup> Level Registration/Pre-function Area

**Note:**

Break Refreshments available until 10:00 a.m.

9:30 a.m.-  
10:15 a.m.

**“Growth Champion of the Middle Market”**

Growth Champions of the middle market, companies that have grown by more than 10% post recession, share unique characteristics by their management priorities and the culture created within their companies. Scott Mueller, President and Chief Executive Officer of Dealer Tire, shares his insights as to how his company became a Growth Champion.

**Location:**

Palace Ballroom

**Moderators:**

Scott Chaikin

Chair, Middle Market Involvement Committee

*Greater Cleveland Partnership*

Chairman and Chief Executive Officer

*Dix & Eaton*

Dr. Anil Makhija  
Academic Director, *National Center for the Middle Market*

**Speaker:**

Scott Mueller  
President and Chief Executive Officer  
*Dealer Tire*

10:30 a.m.- **Concurrent Breakout Sessions**

11:15 a.m.

**“Focus on Innovation”**

The strongest common theme across Growth Champions is a relentless focus on innovation. Continuous innovation is seen not only as a key to survival but also as their most important asset in competing with larger businesses. More than one-half of Growth Champions invest in innovation and new product development compared with only a quarter of the rest of the segment. Our panelists will share the power of innovation on their companies and how it has impacted their growth.

**Location:**

Palace Ballroom

**Moderator:**

Jack Schron  
President and Chief Executive Officer  
*Jergens Corporation*

**Panelists:**

Wayne Hellman  
Chief Executive Officer  
*Advanced Lighting Technologies, Inc.*

**“Growth Through Broader Geographic Vision”**

Growth Champions clearly articulate the need for a larger and broader geographic vision — whether in the form of manufacturing, sourcing footprint, or in finding new opportunities in fast growing foreign markets for their products and services. Depending on the industry in which they operate, some may even start with a global sales and marketing strategy. Our panelists share how they grew their

companies by going beyond their traditional markets.

**Location:**

Stillman Room  
2<sup>nd</sup> Level

**Moderator:**

Darin Haines  
President, Advanced Technologies  
*MCPc*

**Panelists:**

Jodi Berg  
President and Chief Executive Officer  
*Vitamix*

Kimberly Smith  
Company Spokesperson  
*PLIDCO*

**“Customer Focus for Growth”**

One key driver for success in the Middle Market is the ability to continuously attract new customers and enter new markets, thus it is no surprise that Growth Champions invest heavily in the area of customer relationships. Our panelists share how their customer focus has driven their company’s growth.

**Location:**

State Room  
3<sup>rd</sup> Level

**Note:** State Room is located on the 3<sup>rd</sup> level of the Conference Center and is accessible by the elevator or stairway

**Moderator:**

John Ranieri  
Chief Financial Officer  
*Revol Wireless*

**Panelists:**

Bernie Moreno  
President and Chief Executive Officer  
*Collection Auto Group*

Peter Paras  
President and Chief Executive Officer  
*Parts Associates, Inc.*

### **“Investing in Talent”**

For most Middle Market companies, the need to focus on talent becomes quite obvious as they gain critical mass and transition from operating like a small company, but few manage to attract and retain talent. Growth Champions, though, stand out for their success in attracting talent — by offering innovative career development training, stock options, and attractive compensation structures. Our panelists share why they invested in talent to grow their companies.

**Location:**

Allen Room  
3<sup>rd</sup> Level

**Note:** State Room is located on the 3<sup>rd</sup> level of the Conference Center and is accessible by the elevator or stairway

**Moderator:**

Mark D’Agostino  
President  
*Connected Business Services*

**Panelists:**

Kevin Goodman  
Partner  
*Bluebridge Networks*

### **“High Performing Management Teams”**

As businesses transition from the small segment to the Middle Market, one important area of focus is the development of management capabilities. Growth Champions seem to do a better job at this compared to the rest of the group. They typically articulate a corporate vision, develop aligned business strategies, institute robust processes, and manage their performance well. Our panelists share the impact a high performing management team has on their companies.

**Location:**

Embassy Room  
3<sup>rd</sup> Level

**Note:** State Room is located on the 3<sup>rd</sup> level of the Conference Center and is accessible by the elevator or stairway

**Moderator:**

**Panelists:**

Philip Alexander  
President  
*BrandMuscle*

11:30 a.m.-  
12:15 p.m.    **Closing Session: “This Morning’s Key Insights”**

This session will wrap up the morning’s program and include an “on demand” survey of the Forum’s participants on the critical issues and challenges facing their companies.

**Location:**

Palace Ballroom  
2<sup>nd</sup> Level

**Speaker:**

Scott Chaikin  
Chair, Middle Market Involvement Committee  
*Greater Cleveland Partnership*  
Chairman and Chief Executive Officer  
*Dix & Eaton*

12:15 p.m.    **Lunch**

**Note:**

Specialty Box Lunches are available for you to enjoy in the Palace Ballroom or to take with you when departing the Greater Cleveland Middle Market Forum.