

NOVEMBER 19-21, 2025

UNITED WE STAND - AGENDA

DAY 1 - WEDNESDAY NOV 19:

10:00 - 2:00 Golf at Grandover

3:00 - 4:00 NCPMA Board Meeting

5:00 - 6:30 Social Hour

DAY 2 - THURSDAY NOV 20:

7:00 - 8:00 Breakfast (included in registration fee)

8:00 - 8:10 NCPMA Kickoff

8:10 - 8:30 Nick Bartolo

8:30 - 9:30 Session 1

9:30 - 10:00 Q&A/discussion

10:00 - 10:15 BREAK

10:15 - 11:15 Session 2

11:15 - 11:45 Q&A/discussion

11:45 - 1:00 LUNCH

1:00 - 2:00 Session 3

2:00 - 2:30 Q&A/discussion

2:30 - 2:45 BREAK

2:45 - 3:45 Session 4

3:45 - 4:15 Q&A/discussion

4:15 - 4:30 NCPMA Wrap Up

5:00 - 6:30 Cocktail Reception

DAY 3 - FRIDAY NOV 21:

7:00 - 8:00 Breakfast (included in registration fee)

8:00 - 8:15 NCPMA Leadership Academy Development Graduation

8:15 - 9:15 Session 5

9:15 - 9:45 Q&A/discussion

9:45 - 10:00 BREAK

10:00 - 11:00 Session 6

11:00 - 11:30 Q&A/discussion

11:30 - 11:45 NCPMA Wrap Up

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UNITED WE STAND - AGENDA

SESSION TOPICS:

1. DEVELOPMENT OF A SALES CULTURE: Inside and out

Maintaining a healthy sales culture year after year is important for growth and saves big money. Learn and understand more about metrics, expectations and keys to success from industry leaders Paul Bergmann and Jeff Dunn.

Speakers: Paul Bergmann, CEO Anticimex and Jeff Dunn, Co-President, Northwest Ext.

2. MARKETING: All and modern marketing strategies/tracking ROI

Marketing for home services has evolved and is evolving faster than most can keep up with. Gain a masterful understanding of the basics of the most impactful uses for Al in our industry/business and how to best measure the impact of your marketing spend.

Speakers: Marcus Clinton, Marketing Director, Triangle Home Services and Madi Allen, X-rai

3. MERGERS & ACQUISITIONS: A different perspective - When not to sell

Private Equity interest. The largest brands' motivation to capture market share. Interest rate fluctuations. As the M&A landscape changes, what should we know? When should we sell? Or better yet, what can we do today to add value to our business for a sale down the road? When should we NOT sell?

Speakers: Nick Bartolo, Essential Partners, Wealth Advisor & Tax Strategist and Brent Agee, CEO AXN Growth Partners

4. PEOPLE PANEL: Finding good people, encouraging conflict resolution and coaching growth

Hear it from the industry/region's culture gurus! Recruiting, retention and helping our team members to raise their leadership LID, what do we need to know.

Speakers: Paul Bergmann, CEO Anticimex and Brent Agee, CEO AXN Growth Partners

5. EXPANSION: When to expand/scale/open a new branch office

So you are thinking about expanding your geographical footprint. What should we know, consider and plan for? Or just go for it? Paul and Jeff talk about expansion and what to know going in and what you may not expect.

Speakers: Paul Bergmann and Jeff Dunn

6. PROFIT LEVERS: How small changes may result in big profit swings!

Financially speaking, the reason we do what we do is to make money. What small changes are we potentially overlooking that may make a substantial impact on profit? What do these strategies mean to you? Are you more resistant to change than putting more money in the bank? What sense does that make?

Speakers: Jeff Dunn, Nick Bartolo and Brent Agee