PRODUCT SAFETY & STEWARDSHIP CONFERENCE & LIABILITY SEMINAR

SAFEGUARD MARKET ACCESS, LEVEL UP YOUR CAREER

April 22-25, 2024
Crowne Plaza Chicago O’Hare Hotel

PRELIMINARY AGENDA
Bridging the Generation Gap

Keynote Speaker
Meagan Johnson

Our generations and the gaps that separate them are in constant flux, what worked last year probably won’t work today. The potential for collision, conflict and confusion between the generations has never been greater and the chasm is growing wider every day we ignore the problem. In this keynote, generational expert Meagan Johnson will demonstrate through her own experience, in depth research and program customization, that all generations have differences and strengths that go beyond mere age and appearance.

The First-time attendee orientation session is a comprehensive introduction designed to help newcomers navigate the event. You’ll learn about the conference schedule, networking opportunities, and have a chance to meet fellow attendees. It’s a great way to get a clear understanding of what to expect throughout the conference.

Registration is free but required for a breakfast count.
Track 4 – Product Management
BUILDING MOMENTUM WITH AEM: UNLOCKING YOUR MEMBER BENEFITS

Presented by Kate Fox Wood, Sara Stromski, AEM

Many of you attend this conference to learn about the latest safety standards and best practices. But did you know your membership with AEM offers a treasure trove of other benefits? This session will guide you through a high-level overview of AEM benefits as well as provide a deeper dive into AEM Advocacy and the current legislative landscape to help your organization achieve success within the industry.

Track 3 – Technical Communications
INTEGRATING PARTS INFORMATION INTO PROCEDURAL INFORMATION

Presented by Don Bridges, JANA Corp

While service information and parts information are intrinsically connected, many manufacturers treat the respective technical content as separate entities managed by different processes and with different needs. In a digital environment, dealers and end users expect to easily navigate from a service procedure to the parts required to accomplish the task. Product down-time and the overall service process is significantly impacted when the wrong part is ordered, to say nothing of end-user frustration.

This presentation will discuss why OEMs should look to integrate parts and service information to drive product safety, internal spare part sales profitability, and customer satisfaction. Beyond ‘tech pubs’, the presentation will look at integrating product lifecycle management (PLM) and enterprise resource planning (ERP) information into technical content.

Track 2 – Advanced
EMISSIONS

Presented by Matt Spears, Cummins

Session description coming soon.

Track 1 – Principles
INCIDENT INVESTIGATION 101

Presented by Todd Hetrick, Exponent

Session description coming soon.
Track 1 – Principles
BATTERY - SHIPPING, HANDLING, AND STORAGE

Presented by Daniel O-Neil, Cummins

As lithium ion vehicle batteries become more and more prevalent, the multitude of applicable rules, regulations, and requirements continue to evolve at a rapid pace. Cummins currently provides very high energy commercial vehicle batteries to the market, and subsequently the company must keep informed of updates and changes to ensure we are implementing best practices for shipping, handling, and storing these batteries. This discussion will center around what we have learned and implemented over the past several years in this space.

Track 2 – Advanced
NEW POWER, NEW REGULATION: WHAT TO KNOW ABOUT EU BATTERY REGULATION

Presented by John Inman, Cummins

New technologies bring new materials, supply chains, risks and regulations. This couldn’t be more true in the example of the EU Battery Regulation, which is a comprehensive new requirement with obligations for battery producers ranging from supply chain due diligence, recycled content minimums and carbon footprint disclosure. In this presentation, we will discuss the requirements and why having management capability in place will reduce risk to the organization as we transition to a lower carbon economy.

Track 3 – Technical Communications
AI TOOLS - WORKSHOP

Presented by Aaron Murray, Ken Cook Co

Session description coming soon.

Track 4 – Product Management
PRODUCT LIFE CYCLE - MOCK CASE

Presented by Peter Decious, Vermeer and Kaitlyn Marsman, Twistthink and Sam Gallegos, Alamo Group and Debbie Vogel, Alamo Group and Kris Harrington, GenAlpha and Andrew Lothson, Swanson Martin & Bell Moderator: Aaron Murray, Ken Cook Co

Session description coming soon.
Track 1 – Principles

**FUNDAMENTALS OF PRODUCT SAFETY 101**

*Presented by Vern Hoppes, Ada Bendorf  
John Deere*

The session is targeted for the new Product Safety Engineer to provide some basic understanding of methods of helping to identify a product potential weak link that may lead to an injury of a user, bystander, or service person. It is intended to be a guided, but open discussion where participants interaction is encouraged.

Track 2 – Advanced

**ELECTRIFICATION SAFETY - AVOIDING ELECTRIC SHOCK**

*Presented by Alex Foessel, Rick Weires  
Balanced Engineering*

This is an introduction to electric shock. It begins with a review the four elements needed to cause electric shock: a source of voltage, contact with a person, current flow available, and time. The common solutions to prevention of electric shock are introduced. Finally places to get more information from key ISO and IEC standards are provided.

Track 3 – Technical Communications

**AI AND IP: PROTECTING YOUR IP**

*Speaker Coming Soon*

Session description coming soon.

Track 4 – Product Management

**PRODUCT LIFE CYCLE - MOCK CASE**

*Presented by Peter Decious, Vermeer and Kaitlyn Marsman, Twistthink and Sam Gallegos, Alamo Group and Debbie Vogel, Alamo Group and Kris Harrington, GenAlpha and Andrew Lothson, Swanson Martin & Bell  
Moderator: Aaron Murray, Ken Cook Co*

Session description coming soon.
Track 1 – Principles
OVERVIEW: HOW SHOULD I BE THINKING ABOUT AI?

Presented by Bruce Rasa
Knowledge Systems LLC

Unlock the full potential of AI in the offroad equipment manufacturing sector. This seminar delves into the critical questions surrounding Generative AI, offering insights into its practical application and risk management. Discover how to navigate security, privacy, and safety concerns effectively. We will highlight the transformative opportunities AI presents, focusing on meeting unmet user needs. Benefit from the expertise of successful generative AI pilots, and leave equipped with three key insights to revolutionize your approach to product safety and compliance.

Track 2 – Advanced
PRODUCT CHEMICAL COMPLIANCE – HOW TO SURVIVE THE TSUNAMI

Presented by Cally Edgren

Last year there were over 4000 new regulations notified to the World Trade Organization. It can be overwhelming even for dedicated product compliance professionals to wade through these always-increasing obligations and determine what may impact their business and their products. This session will address strategies for understanding the scope of "chemicals in products" regulations, helping to answer the “Does this apply to me?” question. Methods for assessing and mitigating the risk of new regulations, such as updates to the REACH SVHC list, will also be discussed. It will include many of today’s hot topics and the latest regulations including those addressing PFAS, regulated articles and reporting obligations through TSCA.

Track 3 – Technical Communications
ON PRODUCT WARNINGS: ANSI Z535 AND ISO 3864-2 BEST PRACTICES

Presented by Angela Lambert,
Clarion

“Failure to warn” and “inadequate warnings” continue to top today’s product liability allegations. Angela Lambert will provide an overview of the ANSI Z535 family of standards (ANSI Z535.1 to ANSI Z535.7), as well as the ISO 3864-2 standards, and how they can be used as the foundation for effective labels and instructions. This session will include discussion on the most recent updates to the standards and warnings considerations related to digitalization and automation.

Track 4 – Product Management
PREPARING WITH OUTSIDE COUNCIL TO TESTIFY

Presented by John Tyrell,
Ricci Tyrell Johnson & Grey

Whether you are selected to testify or otherwise contribute to the defense of a products liability lawsuit, working well with outside counsel is a critical component to success. This session will examine the expectations and collaboration from both sides of the company/outside counsel relationship in the specific context of preparing a company witness to testify at deposition or trial.
Track 1 – Principles
HUMAN FACTORS IN EMERGING TECHNOLOGY

Presented by Fahreen Khan

Session description coming soon.

Track 2 – Advanced
FUNDAMENTALS - PRODUCT RISK ASSESSMENT 202

Presented by Bryan Brady, Leon Maxheimer
Caterpillar

This track will discuss various risk assessment methods and tools that are targeted for development of machinery to mitigate hazards to people. There will be a discussion about when to use specific tools and the strengths and weaknesses of various product risk assessments.

Track 3 – Technical Communications
TRANSLATING FOR THE FUTURE

Presented by Nenad Furtula, Bluestream

For many organizations, doing business internationally has become a norm, and proficient translation of technical documentation has become a must. This talk is geared towards organizations looking to understand the art of possible, to take ownership of their translation process, and to reduce the time to market while reducing overall costs and increasing the accuracy of translations. The presentation will look at past and current trends in structured content as well as at the impact of AI on the translation of technical documentation.

Track 4 – Product Management
REGULATORY ROADMAP: BEGINNER’S GUIDE TO NAVIGATING REGULATIONS

Presented by Jason Malcore
AEM

This session provides a conceptual and practical overview of the global administrative regulatory framework. Attendees will be provided with the tools to understand modern policymaking to efficiently locate, interpret, and apply regulations to their relevant product portfolios.

Insights on how to leverage legal resources, government communications, databases and other resources to ensure manufacturers stay ahead of the ever-changing global compliance environment.
CLOSING KEYNOTE

TUESDAY APRIL 23

4:00-4:45 PM

CLOSING KEYNOTE

6:00-8:00 PM

NETWORKING NIGHT

Join us for an exciting event at Kings Bowl - Dining and Entertainment. This vibrant gathering is a fantastic opportunity to connect with fellow professionals. Kings offers elevated gaming and entertainment in a sleek retro environment. Don’t miss out on the chance to socialize and exchange ideas with peers. Drinks and food will be provided. Groups will walk to the venue located just behind the Crowne Plaza.

Registration is required. Separate ticket fee $49.

CYBERSECURITY: IN THE MACHINE AND ON THE JOB

Jenny Margaros
Closing Keynote Speaker

This session will address cybersecurity threats and the vulnerabilities inherent in connected systems and machines, as well as the potential disruption and dangers on the jobsite or in the field. Join U.S. Department of Homeland Security’s Section Chief of the Critical Manufacturing Sector, Jenny Margaros, as she guides us through this important discussion.
Is your safety program growing stale and ineffective? Are you tired of saying RTFM? (Read the fancy manual, that is.) In this workshop, we will learn creative thinking techniques to overcome challenges that cause people to tune out from safety conversations. Attendees will work together to use the techniques for real-world problems.

Track 3 – Technical Communications
TECHNICAL COMMUNICATION FOR A GLOBAL AUDIENCE

Presented by Justin Maley, Vermeer

Explore the art of crafting Technical Communication for a Global Audience in our upcoming discussion, where we delve into the intricacies of effective cross-cultural communication.

Unlock the secrets of writing Technical Communication that transcends borders and resonates with diverse audiences worldwide. Together we will work to elevate your technical writing skills by participating in a dynamic dialogue about tailoring your communication to meet the needs of a global audience.

Track 2 – Advanced
ADDRESSING PFAS IN A RAPIDLY CHANGING REGULATORY LANDSCAPE

Presented by Monika Kotkowska, DXC Technology

A recent study revealed that more than 98% of Americans have detectable PFAS levels, raising concerns about potential exposure risks. However, the implications of PFAS extend well beyond the borders of the United States, significantly influencing the global regulatory landscape. For companies operating on a global scale, addressing the challenges posed by PFAS demands a strategic approach to navigate the rapidly evolving dynamics. We will explore the challenges in 2023, discuss what's new in 2024, and learn how businesses can proactively tackle these challenges while promoting sustainability.

Track 4 – Product Management
USING CREATIVE THINKING TO IMPROVE SAFETY

Presented by Ashley York, Manitou

Is your safety program growing stale and ineffective? Are you tired of saying RTFM? (Read the fancy manual, that is.) In this workshop, we will learn creative thinking techniques to overcome challenges that cause people to tune out from safety conversations. Attendees will work together to use the techniques for real-world problems.
**Track 1 – Principles**

**A GLOBAL VIEW OF PRODUCT REGULATORY AND COMPLIANCE**

*Presented by Steve Haytcher, Caterpillar*

Global markets provide a growing opportunity for product sales but meeting compliance requirements for many countries is increasingly challenging. New regulations may be driven by many factors including national economic interests, geopolitics, and the energy transition. Some countries are transparent and deliberate in establishing new regulations while others may significantly change requirements with little or no warning. This session will provide a summary of how regulatory requirements are evolving in regions and countries such as Africa, Australia, European Union, China, Middle East, Latin America, India, and South East Asia.

**Track 2 – Advanced**

**TOOLS AND APPROACHES TO QUALIFY PERFORMANCE AND WEAKNESSES OF AI COMPONENTS IN OFF-ROAD VEHICLES**

*Presented by Alex Foessel, Balanced Engineering and Rick Weires, Balanced Engineering*

**Track 3 – Technical Communications**

**INTERACTIVITY IN ELECTRONIC DOCUMENTATION**

*Presented by Anthony Rosten, Ken Cook Co*

In this workshop we will discuss the value of interactivity in electronic documents, with a focus on its application in different types of .pdf files. Using Adobe InDesign as the authoring tool, we will demonstrate how to create inter-document navigation, hyperlinks, and buttons to bring expanded functionality to your files.

**Track 4 - Product Management**

**LESSONS LEARNED FROM IMPLEMENTING A CORPORATE FUNCTIONAL SAFETY PROGRAM**

*Presented by Clayton Westerfeld, Cummins*

Session description coming soon.
Track 1 – Principles
EU 2024 Regulatory Landscape: Navigating Sustainability and Supply Chain Compliance

Presented by Monika Kotkowska, DXC Technology

Join me for an insightful session where I provide an in-depth overview of the latest EU regulatory developments and anticipated changes in sustainability and supply chain compliance for 2024. I will shed light on what these regulations entail and share strategies on how companies can best prepare to navigate this evolving terrain successfully.

Track 2 – Advanced
Incident Investigation 201

Presented by Todd Hetrick, Exponent

Session description coming soon.

Track 3 – Technical Communications
How to Improve Terminology Effectiveness in Tech Pubs

Presented by Wendy Canal, Epiroc

Creating a glossary of terms within your industry is not only for clarification for the average reader but provides clarification for translators. Technical terms and industry jargon can be misunderstood and difficult to translate. In this session, we will discuss the importance of a term glossary to ensure terminology consistency and improve the quality of your documentation.

Track 4 – Product Management
New Energy Machinery in China - Policies, Regulations, and Standards

Presented by Shirley Kong, BESTAO

With China's vigorous pursuit of carbon neutrality, machinery plays a crucial role in carbon reduction, leading to expectations of increasingly stringent compliance regulations. Overview of China's 'green transition': goals and timelines. Impact of carbon-related policies on the machinery sector in China. Expected standards and regulations in the near term.
Track 1 – Principles
INTRODUCTION TO THE REGULATORY AND STANDARDIZATION LANDSCAPE OF CHINA
Presented by Shirley Kong
BESTAO
Overview of China's standards and regulatory system. Mapping of key stakeholders, including government ministries and standard bodies, and their interactions. Highlights of the agriculture and construction machinery sector: major TCs, their primary focuses, and their connections with international standard organizations (ISO, IEC, etc.)

Track 2 – Advanced
REVISION TO THE EUROPEAN MACHINERY DIRECTIVE
Speaker to be announced.
Session description coming soon.

Track 3 – Technical Communications
A DEEPER DIVE OF POTENTIAL AI RISK MANAGEMENT AND POTENTIAL BENEFITS
Presented by Bruce Rasa,
Knowledge Systems LLC
Explore the transformative power of AI in enhancing product safety and compliance. This seminar offers an in-depth look at AI's creative potential and the reality of its 'hallucinatory' outcomes. Learn to navigate these challenges and leverage AI effectively in your field. Gain insights into source verification, risk management, and reliability considerations for AI deployment in 2024. Walk away with five practical strategies for integrating AI into your work, including lessons learned from experience in developing generative AI pilots. Enhance your expertise, avoid common pitfalls, and drive innovation in product safety.

Track 4 – Product Management
SHARING A LENS: SOCIAL MEDIA AND PRODUCT SAFETY
Presented by Summer Peters,
Bobcat
While most of us are not social media experts, it may be helpful to get involved in the types of assets our companies post. In this interactive session, we will evaluate real social media examples, review methods of portraying your company’s messages, and discuss ways to work cross-functionally with your marketing team to share a common lens.
Track 1 – Principles
STANDARDS– WHY SHOULD I CARE?

Presented by Travis Tsunemori, Kubota and Tom Hoffman, Kuhn

Session description coming soon.

Track 2 – Advanced
ACCIDENT RECONSTRUCTION

Presented by Krista Kellam, Illinois State Police

Session description coming soon.

Track 3 – Technical Communications
PANEL DISCUSSION: WHAT KEEPS YOU UP AT NIGHT?

Presented by Josh Nicklaus, Vermeer and Wendy Canal, Epiroc and Doug A. Shoup, JLG and Ashley York, Manitou

Session description coming soon.

Track 4 – Product Management
NAVIGATING THE NEXT-GEN CUSTOMER EXPECTATIONS: STRATEGIES FOR PRODUCT MANAGERS

Presented by Kris Harrington, GenAlpha Technologies

As Product Managers, it's crucial to adapt to the changing landscape of customer expectations. Join us for a focused presentation that will delve into essential strategies for Product Managers in the Equipment industry. We will explore understanding the unique traits of different generations, examining the specific preferences of today's Equipment customers, and discussing the crucial role technology plays in meeting customer expectations. Attendees will leave with actionable insights and practical steps to enhance their product management approach, ensuring they are well-prepared to navigate and thrive in the evolving customer landscape.
Track 1 – Principles
UNDERSTANDING THE EMC TESTING REQUIRED IN IEC61000 AND ISO13766-1 & -2

Presented by Kevin Lueschow

EMC (Electromagnetic Compatibility) testing of electrical and electronic machines and components can be an expensive, bewildering and frustrating process. This session will discuss the various tests that must be run to prove that a product is safe and effective in the workplace, what can be done when a product fails one or more of the tests, and why these tests are being performed. The attendees will gain insight into design choices that improve a products chance of passing EMC testing as well as choices that all but guarantee a retest will be necessary.

Track 2 – Advanced
HOW ESG VIEWS PRODUCT SAFETY

Presented by Chuck LePard

This session will explore how recent increased focus on Environmental, Social and Governance (ESG) considerations align and differ from Environmental Health and Safety (EHS). Supply chain incidents over the last several years have raised awareness of ways in which a company’s ability to deliver product can be impacted by factors beyond a firm’s ability to control. Learn how monitoring and acting upon ESG and broader sustainability considerations can keep your organization successful while other struggle with disruptions.

Track 4 – Product Management
HOW TO SATISFY LEGAL AND STILL WRITE A GOOD USER MANUAL

Presented by Kenneth Ross

Session description coming soon.

Track 4 – Product Management
STRUCTURED CONTENT: A CRITICAL COMPONENT OF A ROBUST PRODUCT LIFECYCLE MANAGEMENT STRATEGY

Presented by Don Bridges, Jana Corp

The need to make available the right product content (i.e., manuals, guides, bulletins, etc.) in the right format to the right people at the right time is a daunting task for many companies in multiple industries. Implementing a product lifecycle management (PLM) strategy without creating and managing all the related product content is a non-starter for most companies, especially those with complex and long service life products such as machinery and heavy equipment. This presentation will provide insight into how and why structured content is a critical component of a robust end-to-end PLM strategy. The presentation will also study the need for structured content and describe how it fits within an enterprise content model and will consider a typical PLM environment that includes the appropriate content solutions.
General Session

CUSTOMER INSIGHTS AND TRENDS IN ELECTRIFICATION

Presented by Kristen Cole, McKinsey & Company

In this session, global management consulting firm, McKinsey & Company, will present an update on evolving industry trends including electrification and hydrogen, brand loyalty, and connected services. They will discuss the overall ecosystem, implications, and challenges around electrification such as charging infrastructure and grid integration. Hear how OEMs, dealers and other players parallel to the industry are navigating these changes.
Amundsen Davis is pleased to present a comprehensive, full-day mock trial program designed for safety and compliance professionals. Participants will experience a realistic courtroom setting, complete with witness testimonies, evidentiary presentations, and jury deliberations. The program is designed to be interactive, encouraging attendees to engage with the material, ask questions, and discuss strategies with the presenting attorneys.

This mock trial program is an opportunity for safety and compliance professionals to understand the intricacies of product liability litigation, particularly in the context of advanced technologies and international manufacturing. It provides a unique blend of legal education, practical insights, and professional networking, all geared towards enhancing understanding and skills in product liability defense. This immersive experience will focus on a sophisticated and contemporary fact pattern involving battery-powered industrial equipment manufactured by a foreign company, which caught fire causing property damage and personal injuries.

Participants will gain insights into:

• **Legal Framework and Challenges:** Understanding the nuances of product liability law, especially as it pertains to emerging technologies.

• **Cross-Border Manufacturing Issues:** Examining the legal complexities when dealing with foreign component manufacturers in product liability cases.

• **Safety and Compliance:** Strategies for ensuring safety and compliance in the design and manufacturing of technologically advanced products.

• **Litigation Skills:** Observing and learning trial advocacy skills, including witness examination, argument presentation, and jury persuasion techniques.

• **Risk Management:** Identifying potential risks and developing strategies for managing them in product design and manufacturing.

Registration is required. Separate Fee Required to Attend