PRODUCT SAFETY & STEWARDSHIP CONFERENCE AND LIABILITY SEMINAR

SAFEGUARD MARKET ACCESS, LEVEL UP YOUR CAREER

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

PRELIMINARY BROCHURE
Registration for the 2024 Product Safety & Stewardship Conference and Liability Seminar will open on Monday, April 22 at 2:00 PM.

After attendees and guests register, they are invited to join us for the Welcome Reception starting at 6:00 PM. This is a great opportunity to network and meet peers in the industry prior to the kickoff of the Product Safety & Stewardship Conference.
BRIDGING THE GENERATION GAP

Meagan Johnson
Opening Keynote Speaker

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.
Track 1 – Principles
INCIDENT INVESTIGATION 101

Presented by Todd Hetrick, Exponent

Session description coming soon.

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

Presented by Manish Patel, 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

Join Aaron Murray, the Director of Customer Engagement and Product at Ken Cook Co., for a thought-provoking presentation on generative AI. Bringing over 20 years of leadership experience from his tenure at notable companies like Envisiontel, DividedBy9, Apple, and Crocs, Aaron will delve into the practical applications and complexities of generative AI. This presentation will not only highlight how his innovative technology enhances efficiency and creativity but will also thoughtfully address its challenges, including ethical considerations and security risks. Prepare to gain valuable insights as Aaron sheds light on the significant impact of generative AI in modern industries.

Track 4 – Product Management
BUILDING MOMENTUM WITH AEM: UNLOCKING YOUR MEMBER BENEFITS

Presented by Kate Fox Wood and 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.
Concurrent Sessions

**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 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 4 – Product Management**
**FROM CONCEPTION TO EVOLUTION: THE PROCESS OF PRODUCT LIFECYCLE MANAGEMENT PART 1**

*Presented by Debbie Vogel and Sam Gallegos, Alamo Group; Kris Harrington, GenAlpha; Peter Decious, Vermeer; Kaitlyn Marsman, Twistthink; and Andrew Lothson, Swanson Martin & Bell*

*Moderator: Aaron Murray, Ken Cook Co*

This two-part session will highlight a cross-functional Product Liability case example that will focus on the product development process, incident investigation, management of circumstances and the follow up post incident. Experts from multiple roles including, engineering, marketing, quality control and legal will demonstrate the multifaceted approach taken by their teams to navigate unforeseen circumstances.

The focus on 1 will be product development and management of circumstances. Participation in both part 1 and part 2 is highly encouraged.
Track 1 – Principles

**FUNDAMENTALS OF PRODUCT SAFETY 101**

*Presented by Vern Hoppes and 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 3 – Technical Communications

**AI AND IP: PROTECTNG YOUR I.P**

*Presented by Robert Barunians, American Directive*

Session description coming soon.

Track 2 – Advanced

**ELECTRIFICATION SAFETY - AVOIDING ELECTRIC SHOCK**

*Presented by Rick Weires and Alex Foessel, 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 4 – Product Management

**FROM CONCEPTION TO EVOLUTION: THE PROCESS OF PRODUCT LIFECYCLE MANAGEMENT PART 1**

*Presented by Debbie Vogel and Sam Gallegos, Alamo Group; Kris Harrington, GenAlpha; Peter Decious, Vermeer; Kaitlyn Marsman, Twistthink; and Andrew Lothson, Swanson Martin & Bell*

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The focus of 2 will be incident investigation and post-incident considerations. Participation in both part 1 and part 2 is highly encouraged.
Track 1 – Principles

**OVERVIEW: HOW SHOULD I BE THINKING ABOUT, 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, Assent*

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 Tyrrell, Ricci Tyrrell 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 Farheen Khan, Rimkus*

Session description coming soon.

Track 2 – Advanced
**FUNDAMENTALS - PRODUCT RISK ASSESSMENT 202**

*Presented by Bryan Brady, 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 Rik Page, 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.
TUESDAY, APRIL 23

CLOSING KEYNOTE

4:00-4:45 PM

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.

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 is 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.
WEDNESDAY, APRIL 24

Track 1 – Principles
STANDARDS - WHAT, WHERE, HOW

Presented by Travis Tsunemori, Kubota and Tom Hoffman, Kuhn

Standards are seemingly everywhere, and it can be overwhelming. Where do I begin? How do I find and purchase standards related to my products? What if there is no standard for my product(s)? Get answers to these questions and many more about how standards are developed and used.

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 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 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 Rick Weires and Alex Foessel, Balanced Engineering

Session description coming soon.

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

Requirements to comply with functional safety standards are increasing across industries due to customer requirements and regulations. Functional safety is a complex topic that touches many parts of a technical organization and requires a strong systems engineering approach to development. This presents challenges for large organizations to pivot from their traditional product safety approaches. Functional safety compliance may require new roles, new processes and tools, and a new way to approach safety development. The session will review examples of these challenges and solutions that demonstrated both positive and negative impacts.
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.

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.

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.
WEDNESDAY, APRIL 24

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
GETTING A GRASP ON THE NEW EU MACHINERY SAFETY REGULATION
Presented by Mike Senneff, Product Safety Help LLC

On January 20, 2027, the Machinery Directive 2006/42/EC will be superseded and replaced by a new European Union regulation, 2023/1230/EU. While much of the text of this new safety regulation is carried over from the Machinery Directive, the regulation includes several new requirements that will have direct impact on AEM member companies that place machinery on the marketplace in the European Union.

This session will highlight the major changes within the subject areas of technical documentation, self-certification, operator manual presentation, machine marking, new and revised Essential Health and Safety Requirements, and more. A working knowledge of the Machinery Directive is helpful but not required in order for a participant to gain from this session.

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, Doosan 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- WHO AND WHY

*Presented by Travis Tsunemori, Kubota and Tom Hoffman, Kuhn*

Why should I care about standards development and compliance? This session will cover the direct and indirect costs of compliance and non-compliance and why your involvement in the process is key. I heard from the earlier presentation that XYZ organization develops standards, but who actually writes them? Wait, it’s me?

Track 2 – Advanced
ACCIDENT RECONSTRUCTION

*Presented by Amanda Griffin and Paul Kuhn, Illinois State Police*

We will provide a high level description of the steps we take in determining how a crash occurred and its primary causes. We will also introduce and describe some of the tools we utilize to capture evidence of a crash. Finally, we will attempt to describe how principles of traffic crash reconstruction can relate to crashes and incidents involving large agricultural equipment.

Track 3 – Technical Communications
HOW TO CREATE LEGALLY DEFENSIBLE SAFETY COMMUNICATIONS

*Presented by Kenneth Ross, Bowman and Brooke LLP*

Product safety attorney, Ken Ross, will discuss the legal requirements for providing adequate instructions, how they can be challenged, and best practices for providing instructions and other safety communications that will improve safety and be defensible if an accident occurs.

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, Caterpillar

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 2 – Advanced
HOW ESG VIEWS PRODUCT SAFETY

Presented by Chuck LePard, DXC Technology

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

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

Ask experienced tech pubs pros how they handle the tough work you face. Cost-saving, translating, scheduling, reviewing, innovations, delivery. Very interactive.

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

Presented by Don Bridges, Jana Corp and John Mackrell, CIMData

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.
CUSTOMER INSIGHTS AND TRENDS IN ELECTRIFICATION

Closing Keynote

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.
In re: Lithium-Ion Battery Explosion  
Presented by Kimberly Herring and Michael McGrory, Amundsen Davis Attorneys

Isabelle Faust, Aaron Benz, Marissa Borschke, and Sidney Fimiani, Amundsen Davis Associates

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