




ESTA  *Working Together to Make Your Business Even Better*

**ELECTRONIC SECURITY & TECHNOLOGY ASSOCIATION**



**ESTA 2021 ANNUAL OWNERS' MEETING  
AND FINANCIAL CONFERENCE**

**October 24 - 27, 2021  
Wyndham Grand Hotel, Clearwater Beach  
Clearwater Beach, Florida**

**Preliminary Agenda – Building Your Business**

**Sunday, 10/24/21 – Financial Analysis Meeting – Room: TBD**

8:00 am - Breakfast at hotel (one complimentary breakfast per room)

9 am – 5:00 – Room TBD **ESTA Financial Analysis Meeting** led by renown security industry analysts, **Michael Barnes Associates**, is a full day event. Michael Barnes and Spencer Rogers will analyze your financial information and compare it to their extensive database of industry standards. In this session you will learn important metrics to measure and better manage your company's financial performance. Develop industry KPI's (key performance indicators) essential for running your business, understand the importance of RMR creation costs and how to measure them, acquire knowledge to assess and track attrition. Take advantage of this valuable opportunity to get one-on-one help from the Barnes' team. *Open only to those who submitted financial data.*

6:30 – 9:30 pm **Welcome Reception — Room: Wyndham Poolside**

**Cocktails and heavy Hors d'Oeuvres.** Join ESTA members, family and guests for a meet-and-greet in the pool plaza of the Wyndham Grand. Hors d'Oeuvres and appetizers will be served.

Attire: Dressy casual

**Monday, 10/25/21 – Owners Meeting – Room: TBD**

7:00 am Breakfast at hotel (one complimentary breakfast per room)

8:00 – 8:15 **Welcome, Opening Remarks** –Karen Mackey & Josh Dice

8:15 - 8:30 Company Introductions: Who are you, where are you, and a brief word about what you do.

8:30 – 9:00 **ESTA Financial Analysis Meeting Recap – Spencer Rogers**

**9:00 – 10:15 Keynote Presentation –State of the Industry**

**Alarm Industry and Market Overview by Michael Barnes, Barnes Associates**

What's happening in the security alarm industry? Listen and learn as Michael Barnes presents his **2021 Market & Industry overview**, providing valuable insight on industry competitive structure, operating metrics and market value of security dealer businesses.

10:15 – 10:30 Coffee Break

**10:30 – Noon Special Presentation - “Exit Strategies – How do I Plan?”**

Michael Barnes, Barnes Associates and Bryan Lawrence, Esq, Buchanan Ingersoll.

Do you have an exit strategy for your alarm business? Whether you're planning to retire in near future or way down the road, successful planning will make the transition smoother.

Presentation followed by a short Q and A.

12 – 1:00 pm **Lunch – out**

1:15 – 2:45 **Sharing - Business Development, Part 1**



Share methodologies to improve leadership, company structure, morale and performance.

2:45 – 3:00 Break

3:00 - 4:00 **Sharing - Business Development, Part 2**



4:00 Wrap-up for the day

5:00 **ESTA sponsored event for members, family & guests. TBD**

6:00 **Dinner on your own** or meet up with other ESTA members for dinner at the restaurant of your choice. This event is self-pay. Watch the sunset as you sample fresh seafood on beautiful Clearwater beach.

**Tuesday, 10/26/21 – Owners Meeting – Room: TBD**

7:00 am Breakfast at Hotel (one complimentary breakfast per room)

8:00 – 8:15 Announcements – Karen Mackey

8:15 – 9:00 **Q &A with Counsel – Bryan Lawrence, Esq.**

9:00 – 10:15 **Sharing Session - - Marketing & Advertising**  
Share your most successful marketing and advertising strategies.  
Bring material to share.  
**Group Sharing Facilitator: Josh Dice**



10:15 – 10:30 Coffee Break

10:30 – 11:30 **Sharing Session - Customer Service**  
Share your customer service strategies that put you a cut above the rest.



11:30 – 12:00 **Sponsor Presentation – OPTEX Inc.**  
OPTEX Inc. is a world leading manufacturer of high performance sensing technologies. For over 40 years, OPTEX has been trusted by thousands of customers worldwide for the accuracy and reliability of unique asset protection and loss prevention solutions.

12:00 – 1:00 pm **Lunch sponsored by OPTEX Inc – Thank you!**

1:00 – 2:30 **Jack Conard – Sales Academy**  
Jack Conard, DMP Director of Sales Training and nationally-known sales training professional, will share the keys to sales excellence. Presentation includes brief Q and A.

2:30 – 2:45 Coffee Break

2:45 – 3:30 **Sharing Session - Sales (roundtable)**  
Share how you hire, train, measure, motivate and compensate sales staff. Bring sales compensation models & performance reviews to share.



3:30 – 4:45 **Growing Your RMR – Group Sharing – Facilitator: Jordan Jackson**  
Share ways you have increased and diversified your recurring monthly revenue (RMR) through new ideas, products, programs and new technology.



4:45- Wrap-up and Evaluations

(Tuesday, October 26, continued)

6:30 pm **Cocktails - Room: TBD** Gather for pre-dinner cocktails - After Five Attire  
ANNUAL GROUP PHOTO – Wear a Smile

7:30 – 9:30 **Annual Awards Banquet & Tribute to a Special Guest.  
Sit-down dinner followed by Annual Awards Presentation & Prizes**

**Wednesday, 10/27/21 – Annual Owners Meeting Room: TBD**

7:00 am Breakfast at Hotel, (one complimentary breakfast per room)

8:00 – 10:00 **Annual Business Meeting – ALL MEMBERS MUST ATTEND!**  
Board Member Reports, Treasurer and Purchasing Reports,  
Discuss 2022 meeting location,  
amendments to By-laws and other new business

10:00 – 10:15 Coffee Break

10:15 - 10:30 **What's New at Anixter** – Bill Donahue, Anixter

**ESTA Partner** – *Thank you for your support!*



10:30 – 11:30 Growing your RMR through **New Markets and Trends** - Discussion leader **Josh Dice**

11:30- Noon **EVALUATIONS, TAKEAWAYS & SETTING GOALS for 2022 (roundtable)**

Noon - **Meeting Dismissed – Safe Travels!**

**Thank you to our SPEAKERS, SPONSORS AND PARTNERS - 2021**

**Anixter Distributing – Bill Donahue**

**Anixter helps build, connect, power, and protect valuable assets and critical infrastructures. From enterprise networks to industrial MRO supply to video surveillance applications to electric power distribution, they offer full-line solutions—and intelligence—that create reliable, resilient systems that can sustain your business and community. Through their unmatched global distribution network, supply chain management expertise and technical know-how, they drive efficiency and effectiveness to benefit your bottom line. We thank Anixter for their ongoing partnership and support of ESTA.**



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**Barnes Associates .....Michael Barnes, CEO**

Barnes Associates specializes in providing consulting, financing, acquisition, divestiture and valuation services to the security alarm industry. They have also developed a significant performance benchmarking program and pioneered several analysis techniques now widely used in the security alarm industry. [www.barnesassociates.com](http://www.barnesassociates.com)



We welcome new sponsor, **OPTEX, Inc**, a global leader in indoor and outdoor detection systems using passive and active infrared detection technology, including a variety of hardwired and wireless outdoor and indoor products. Introducing the OPTEX Visual Verification Bridge; the security industry's first affordable, scalable, interior and exterior visual system, providing an easy and cost-effective solution to add video to a standalone or monitored alarm system. Find out how the Optex Bridge solution can add value to your customers and increase your RMR stream. [www.optexamerica.com](http://www.optexamerica.com)