



BUILDING INDUSTRY LEADERS

COVID-19 Crisis

SUMMIT RECAP

APRIL 22-24, 2020

CONTENTS

INTRODUCTION

Matt Ogden | Managing Partner, Building Industry Partners

Craig Webb | President, Webb Analytics



Thank you to all of our friends and colleagues—the more than 100 thought leaders from the U.S. building industry—who came together online for the Building Industry Leaders COVID-19 Crisis Summit, April 22-24, 2020.

This recap's intent is to relay the insights shared during the Summit. It contains live video recordings of all introductory remarks, nine panel discussions, and closing remarks from the Summit, as well as additional relevant and timely curated resources to supplement each panel topic. We hope you find all of it helpful.

For three days, many of our industry's greatest leaders shared questions, challenges, wisdom, and ideas in navigating these unprecedented times.

We exchanged best practices for keeping our people safe while continuing to supply and install the products necessary to keep our country's shelter intact. We explored how to navigate economic uncertainty by scenario planning as well as by tracking and adjusting to key indicators. We discussed organizational action across sales, human resources, operations, financial management, and capital structure. And we did all this with realism as well as resolve, knowing that great challenge inevitably creates great opportunity—to learn, to adapt, to innovate, and to evolve.

We came together for this Summit, during a time of personal isolation, because by combining our collective intelligence, talents, and time, with open minds to learn and open hearts to help one another, we give ourselves and our industry the best chance to survive this crisis and ultimately thrive.

Because of our sector's massive economic and employment scope (which together with our supply channel partners makes up north of 10% of the U.S. economy and workforce), our industry's success is critical to our country's success.

Thank you again for all you've done during these unprecedented times. We are grateful for your participation and look forward to future collaboration.

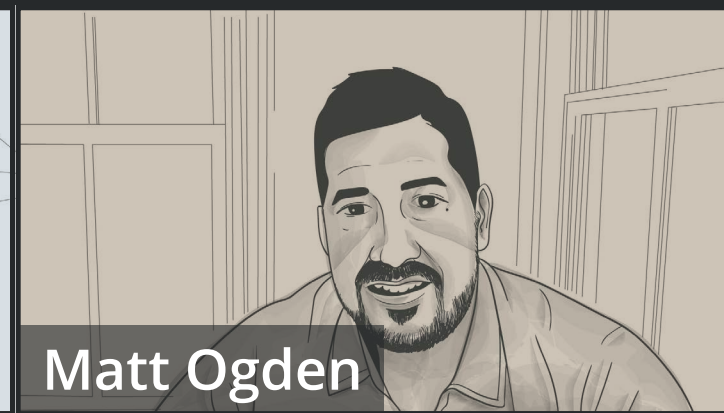
Sincerely,

Matt and Craig

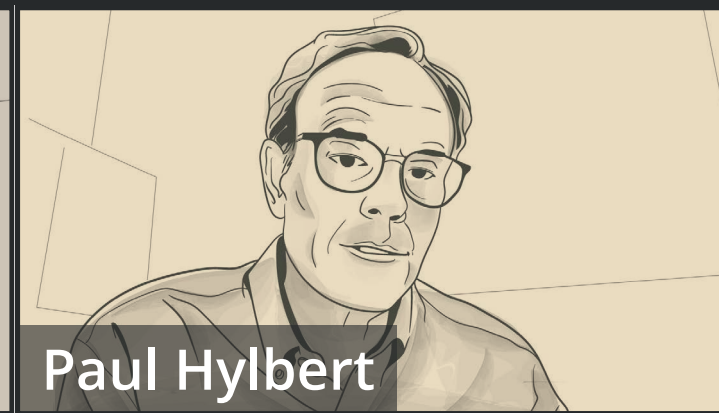
OPENING REMARKS



Craig Webb



Matt Ogden



Paul Hylbert



John Somerville



L.T. Gibson

Day 1



WELCOME

Craig Webb

President, Webb Analytics

Matt Ogden

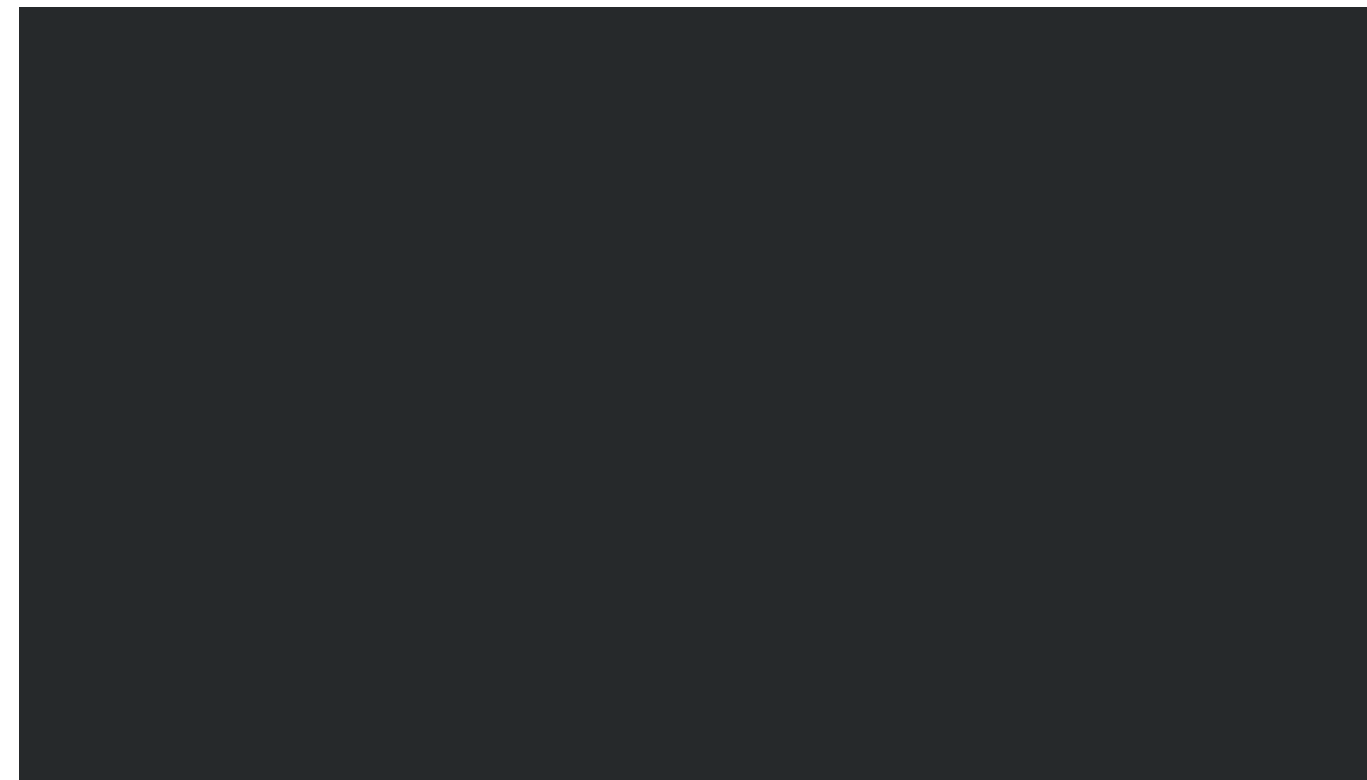
Managing Partner, Building Industry Partners

GUEST SPEAKER

Paul Hylbert

Chairman, Kodiak Building Partners

Day 2

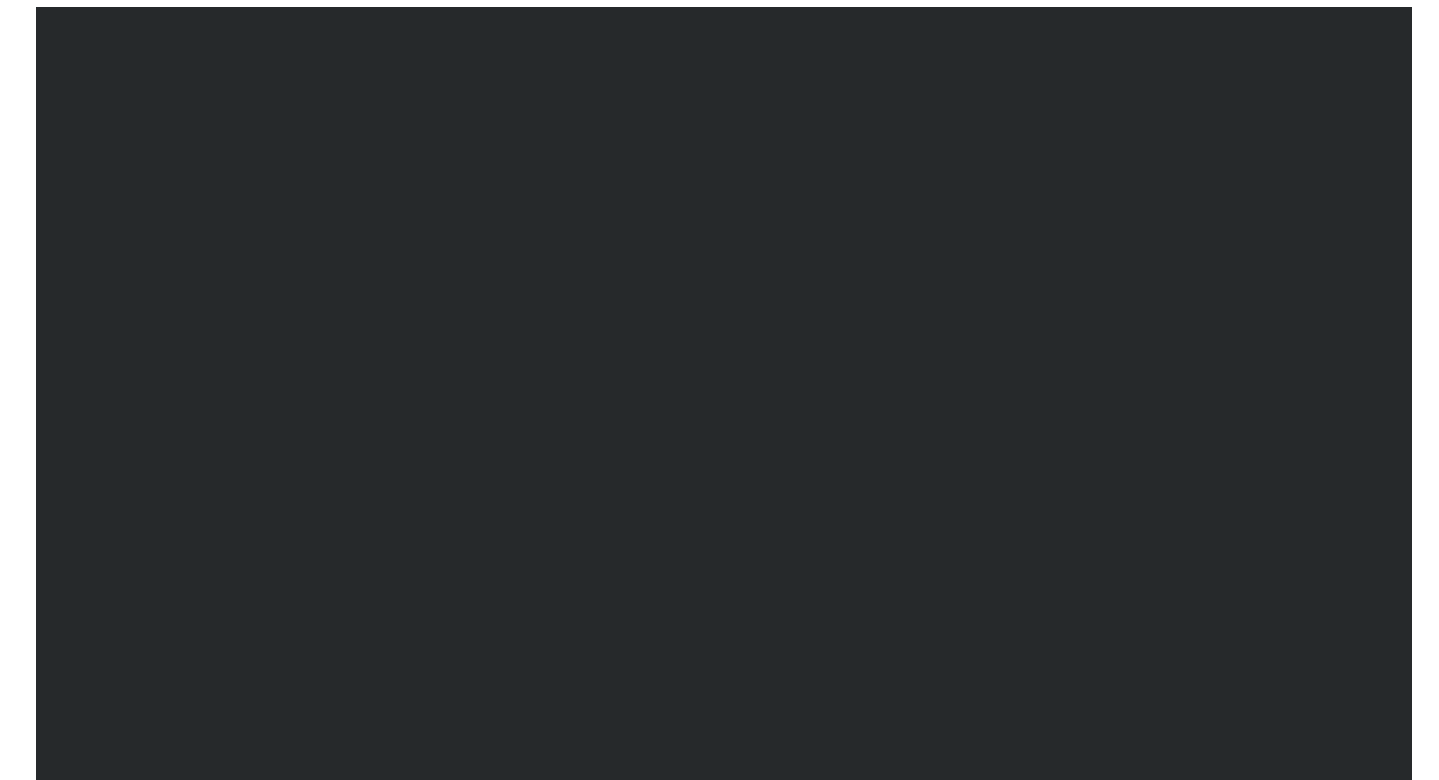


GUEST SPEAKER

John Somerville

President, Lumbermens Merchandising Corporation

Day 3



WELCOME

Matt Ogden

Managing Partner, Building Industry Partners

GUEST SPEAKER

L.T. Gibson

President & CEO, U.S. LBM



PANEL 1

Keeping our people safe and our supply chain open

The Summit kicked off by addressing the most critical questions top of mind for industry leaders during this unprecedented crisis. What can we do to ensure our workforce operates safely? How sustainable are current safety measures? What can each player in the supply chain do to ensure we collectively maintain the sector’s viability? This panel offered a view into the best practices that some of our industry’s most astute leaders are employing to operate safely during the COVID-19 pandemic.

Moderator	Ruth Kellick-Grubbs	President, Kellick & Associates
Panelists	John Kania	Former Global Managing Director, FSG, and Executive in Residence, New Profit
	Matt Kuiken	VP of Operations, Kuiken Brothers
	Levi Smith	President, Franklin Building Supply
	Jim Tobin	EVP & Chief Lobbyist, National Association of Home Builders
	Wendy Whiteash	CHRO & EVP, Culture, U.S. LBM

“I’m optimistic that a lot can come out of this for our businesses. I’m not optimistic that what we’re doing right now is going to fundamentally look different a few months to a year from now. So I think the big challenge is going to be maintaining the discipline on [many] of these measures. And that’s on us. I know we can handle that.”

MATT KUIKEN

“Priority #1 for everybody is the health and safety of our team, our families, our community. And then right behind that, Priority #2 is economic health of our businesses, our communities, our states and our nation. Our industry is uniquely positioned to support both of those priorities. ... We can support our economy and keep people working ... and we can do it safely.”

RUTH KELICK-GRUBBS

ADDITIONAL RESOURCES



PANEL 2

Your near-term sales outlook

What impact on sales volumes have our peers seen from the pandemic and what are our customers telling us about our sales outlook for the next six months? What are the key health and economic drivers of this sales outlook and what scenarios for those drivers are possible? Which segments will be impacted most and which least? This panel of operators and analysts with a national housing market purview addressed the near-term sales volume outlook for dealers, as well as some specific growth segments that seem to be surfacing despite overall challenging economic conditions.

Moderator	John McManus	VP, Editorial Director, Residential Group, Hanley Wood
Panelists	John Burns	CEO, John Burns Real Estate Consulting
	Grant Farnsworth	Director of Business Development, The Farnsworth Group
	Stephen Kim	Senior Managing Director, Evercore ISI
	Steve Sallah	President, LBM Advantage
	Bill Smithers	CEO, CBUSA

“Maybe 10% of the households are going to emerge from this financially impaired, and so therefore unable to act in a manner to increase their investment in housing. But we think roughly 100% of people are going to emerge from this semi-quarantine kind of state wanting to upgrade their dwelling situation in a way that is a result of an exogenous effect that we’ve really never seen before. Something of this magnitude affecting everybody pretty much is going to have an impact on psychology and desire which we think could be extremely powerful.”

STEPHEN KIM

“That initial shock and retreat into the homes may have been the worst of it. People are starting to poke their heads out a little bit and return to some opportunities.”

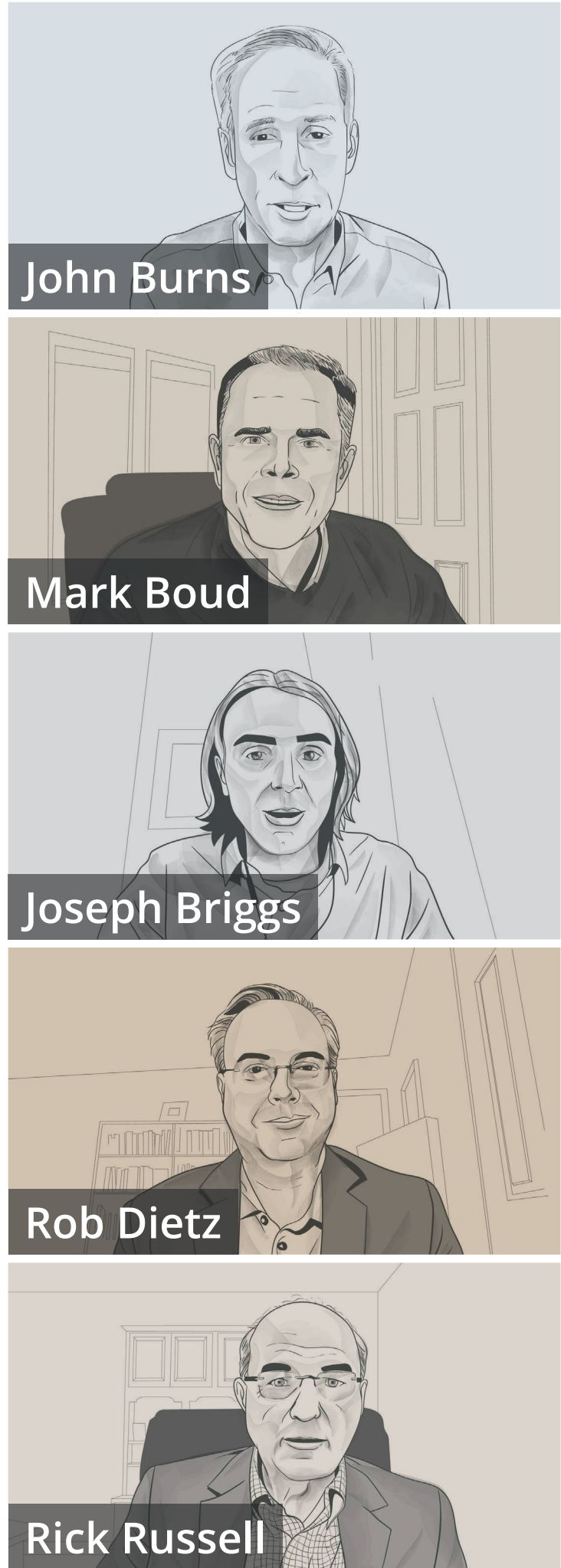
GRANT FARNSWORTH

ADDITIONAL RESOURCES

PANEL 3

The economic and housing recovery: V-, U-, or L-shaped?

As this panel of economists and housing analysts revealed, predictions on when, how, and at what rate the U.S. economy and housing market will recover from the COVID-19 crisis vary greatly. A group of experts shared a range of potential recovery scenarios, shedding important light for prudent business planning.



Moderator	John Burns	CEO, John Burns Real Estate Consulting
Panelists	Mark Boud	Principal, Robbins Boud Real Estate Economics
	Joseph Briggs	Economist, Goldman Sachs; former Economist, Federal Reserve Board of Governors
	Rob Dietz	Chief Economist, National Association of Home Builders
	Rick Russell	President, Millard Lumber

“I don’t see exciting growth in the economy going forward, even after this crisis is over. I think we’ll be flying down, come back up into a ‘J’ form, and then kind of ride a plateau from there. Those individual companies that do well or don’t do well, it’s largely going to be determined based upon their innovation, their ability to adapt, their ability to apply new technologies that will separate themselves from what we’ve done in the past.”

MARK BOUD

“What we’re recommending to builders is just kind of think about things [in terms of] two months, two quarters, and two years. The next two months of data are going to be terrible. Two quarters is basically going to be required for stability, and then [we’ll see] the beginning of a recovery that’s going to take about two years to get to recovery. So I think that’s something not V-shaped. It’s more U-shaped. And I worry about a W—a W being resurgence and outbreaks going forward.”

ROB DIETZ

ADDITIONAL RESOURCES

PANEL 4

Government lifelines and capital structure considerations during the crisis

Capital structure and cash flow management are mission-critical under starkly shifting and uncertain economic and business conditions. The U.S. government has added enormous sources of liquidity for those businesses that qualify and successfully negotiate the maze in time. Understanding what government financial assistance options exist and how to evaluate and obtain them is key. This panel, comprised of corporate finance practitioners from inside and outside the industry, offers insights for business leaders.



Moderator	Margaret Whelan	Founder & CEO, Whelan Advisory
Panelists	Greg Lucas	Partner, Executive Strategy Group and former Director of Finance, SE Division, BMC
	Jeff Makovicka	Partner, Kutak Rock
	Timothy Ryan	Executive Partner and Corporate Finance Specialist, Holland & Knight
	Jeff Smith	CFO, Kodiak Building Partners

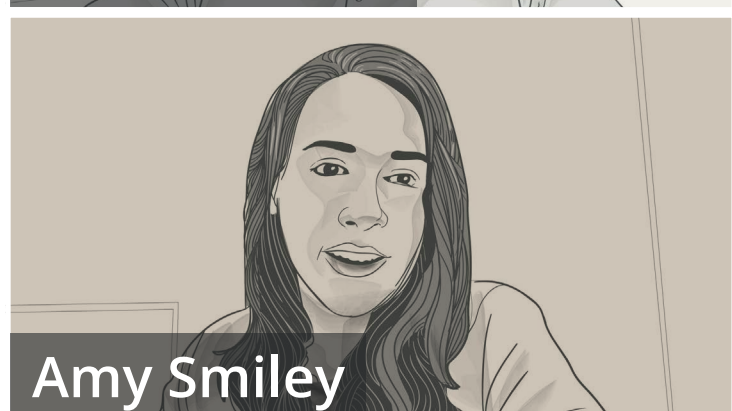
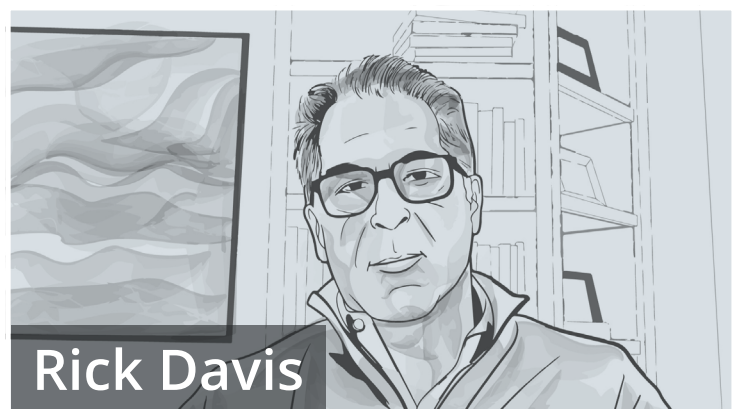
“You want to get with your existing lenders, sit down with them and figure out what next steps could be ... Are we going to look at a new stimulus program? Are we going to look at an old stimulus program? Because the SBA does have some historic programs that help small businesses that have been expanded because of the CARES Act. So, I think the first thing is getting with your lender and discussing some of your options, because if you are going to approach or apply for one of these government programs, your current existing credit facilities are going to be affected.”

JEFF MAKOVICKA

“I would hope that companies will be looking at their capital structures and checking with ... shareholders in small companies to see if the shareholders can either add to the equity or even lend to the businesses on a short-term basis to try to establish liquidity and maintain their going concern issues.”

GREG LUCAS

ADDITIONAL RESOURCES



PANEL 5

Sales and marketing strategies during a pandemic

How are customers’ buying expectations and behaviors changing because of COVID-19, and how can business’ sales and marketing functions adapt as a result? What product and customer segments may outperform others going forward? How can salespeople maintain and even deepen relationships with customers? This panel of progressive sales and marketing thought leaders sheds light on how companies are adapting to a new reality in which the effectiveness of traditional, tried-and-true sales and marketing strategies has waned.

Moderator	Greg Brooks	President, Building Supply Channel
Panelists	Rick Davis	President, Building Leaders
	Bradley Hartmann	President, Behind Your Back Sales
	Chris Kliefoth	Operating Partner, Building Industry Partners; Former CEO, Nationwide Industries
	Amy Smiley	VP of Marketing, 84 Lumber
	Jon Vaughan	CEO, Brand Vaughan Lumber

“This is the time to understand your customers better than you’ve ever understood them. Research, research, research ... Look at their social media, look at their Twitter, their Facebook, their Instagram. Understand what drives them to help their customers ... Changing those mindsets around time management and the importance of the face-to-face, flesh-to-flesh. Because it’s going to be different on the other side ...”

JON VAUGHAN

“One of the things that this whole situation is teaching us here in marketing is that we need to be more proactive on how we can help. We need to help break down some of those silos between salespeople and marketing and how we can work together, and giving them an inside look on how we can reach our target customers. [We need to consider] what kind of metrics we can provide.”

AMY SMILEY

ADDITIONAL RESOURCES

PANEL 6

Operational finance: Expense and working capital management during the crisis

The COVID-19 crisis has intensified the stakes around operational decision-making and prudent financial management. From credit terms to inventory management to rightsizing operating costs, this panel of leading operators discussed some of the changes to regular business practices—and budgets—being made to weather the current storm.

Moderator	Michael Collins	Principal, Building Industry Advisors
Panelists	Mike Howell	President & CEO, Parr Lumber
	Kendall Hoyd	President, Residential Design Services
	Tim Liester	COO, U.S. LBM
	Butch Reimer	President, Tru Cabinetry

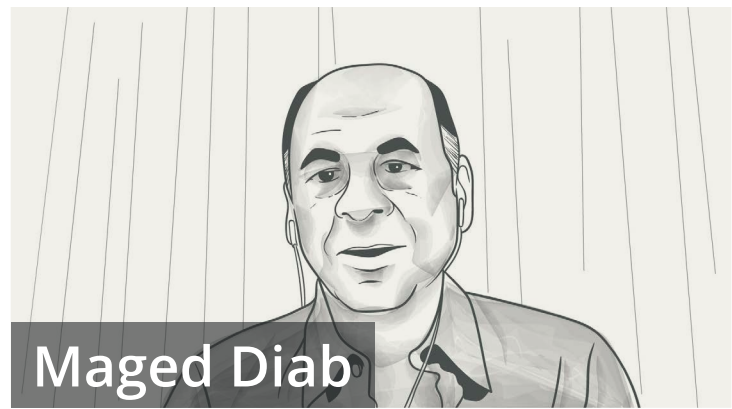
“We don’t want to cut too deep on things that maybe are R&D related or otherwise that you ordinarily would probably cut out. Right now, we’ve rather tried to shift some of those people into other areas of the business, focus in on efficiency and other activities so that they’re available to [play] a role.”

BUTCH REIMER

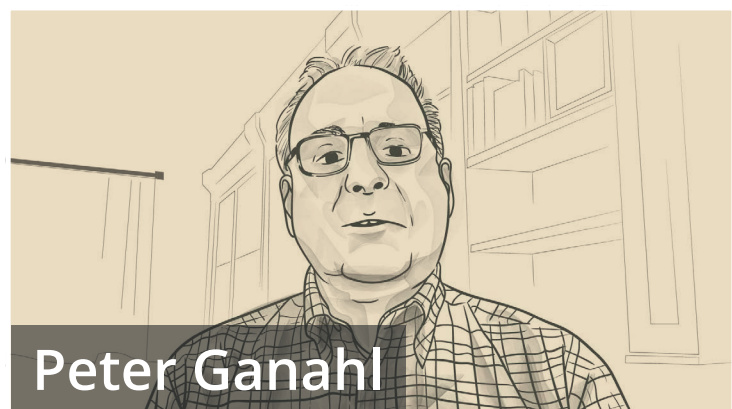
“So when we’re flat-out, we get the order, we put it in the pipeline, and we don’t care so much if it shows up a week or two ahead of the job as much as we want to make sure it’s ahead of the job. But now we’re much more conscious of how close to the installed day that that inventory hits our warehouse.”

KENDALL HOYD

ADDITIONAL RESOURCES



Maged Diab



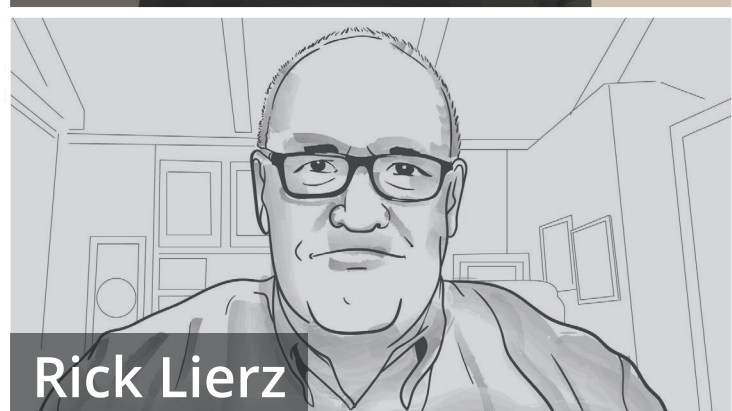
Peter Ganahl



L.T. Gibson



Kevin Hancock



Rick Lierz



Steve Swinney

PANEL 7

Leadership, culture, and communication during a pandemic

Business leaders are navigating their people through unprecedented conditions. What are the core leadership principles leaders draw upon to move their organizations forward prudently? How have corporate culture and communication factored into their effectiveness? Hear directly from industry veterans who share their insights during this inspiring panel discussion.

Moderator	Maged Diab	Operating Partner, Building Industry Partners; Former President, MiTek
Panelists	Peter Ganahl	CEO, Ganahl Lumber
	L.T. Gibson	President & CEO, U.S. LBM
	Kevin Hancock	Chairman & CEO, Hancock Lumber
	Rick Lierz	CEO, Franklin Building Supply
	Steve Swinney	CEO, Kodiak Building Partners

"Today, I would say that answer [to effective leadership] is completely different. It's caring for, communicating with, supporting and cheering on our team. Underlying all that is trust. If you develop that with your team, if we have consistently trusted folks out in our yards to take care of the customer and keep the customers safe and to meet their needs, and if they've trusted us in the corporate office ... that's where we come together in a crisis."

STEVE SWINNEY

"I think the key to leadership in the 21st Century is really to disperse it, to share it, and to try to create a culture where everybody understands that, like it or not, want it or not, that they are a leader. That is the only way you can go about managing through this crisis. It's got to take leadership from every single person in your company."

KEVIN HANCOCK

ADDITIONAL RESOURCES



PANEL 8

Silver linings: Opportunities emerging from the crisis

From great challenge springs great opportunity. While the COVID-19 crisis is creating unprecedented challenges for our industry, it is also accelerating necessary as well as opportunistic change. This thought-provoking panel brought “silver linings” such as technology/innovation, workforce efficiency, industry recruiting, and more to the fore.

Moderator	Craig Webb	President, Webb Analytics
Panelists	Mike Farmer	EVP for Operational, Excellence, People, and Growth, BMC
	Patrick Garcia	VP, Innovation and Technology Adoption, SRS
	Tony Misura	Founder, Misura Group
	Vince Nardo	President, Reborn Cabinets
	Steve Patterson	President & CEO, Central Valley
	Mark Richardson	Senior Research Fellow, Joint Center for Housing Studies of Harvard University

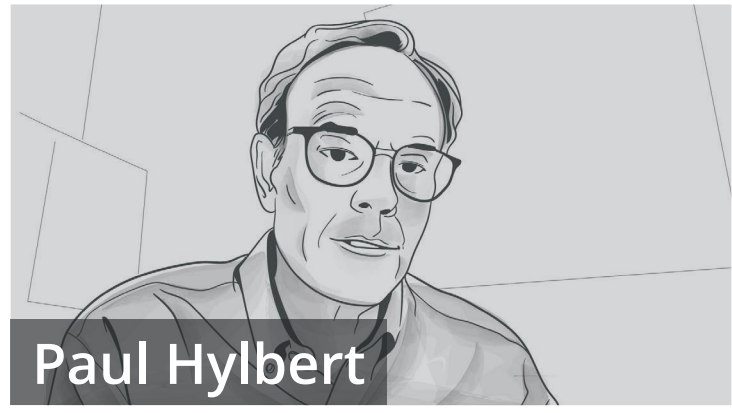
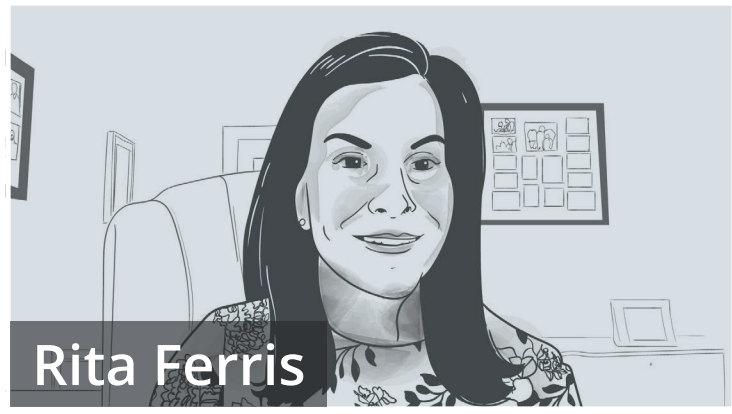
“I can be so much more productive if I can just not only embrace going virtual, but master it. And you can actually, if you’re using more of a virtual model, you can save probably about 50% of the time. That then results in so many additional appointments, additional touch points, which then results in probably 50% to 75% more revenue.”

MARK RICHARDSON

“What this crisis really into [play] is that digital is really possible in our industry. So now you have a customer base that cannot walk into a branch to do business. And our digital revenue mix has shot up 15, 20X. Now, customers are using our online system to do their business.”

PATRICK GARCIA

ADDITIONAL RESOURCES



PANEL 9

Individual and collective action for policy impact

Our sector’s survival and recovery depends on elected officials’ understanding of our significance to the economy and the measures we are taking to ensure safe operations. During the Summit’s final panel, representatives from industry-leading associations focused on our industry’s relations with local, state and federal government officials at such a critical time.

Moderator	Patrick Mascia	Partner, Building Industry Partners; Co-Founder, Rebuild Congress Initiative
Panelists	Russ Kathrein	President & CEO, Alexander Lumber
	Jonathan Paine	President & CEO, National Lumber and Building Material Dealers Association
	Rita Ferris	President, Northeastern Retail Lumber Association
	Jerry Howard	CEO, National Association of Home Builders
	Paul Hylbert	Chairman, Kodiak Building Partners
	Kevin McKenney	Director of Government Affairs, National Lumber and Building Material Dealers Association

“I would send a thank you letter to my governor for allowing me to be open as an essential business. I would contact my local building inspector and say, ‘Hey, we want to make sure we’re a part of the solution to end this. Please stop by my yard. I think we’re doing everything according to plan, but if we’re not, please tell us what we need to do because we want to do this right.’”

RITA FERRIS

“Hearing these business people ... and their level of confidence and their level of commitment to making the American workers safe, the American community safe, and the American economy strong was really inspiring for me, and it’s something else NAHB is going to focus on in spades to make sure that we are letting people know we’re going to come back from this quickly and everything’s going to be all right.”

JERRY HOWARD

ADDITIONAL RESOURCES

CLOSING REMARKS

Matt Ogden | Managing Partner, Building Industry Partners

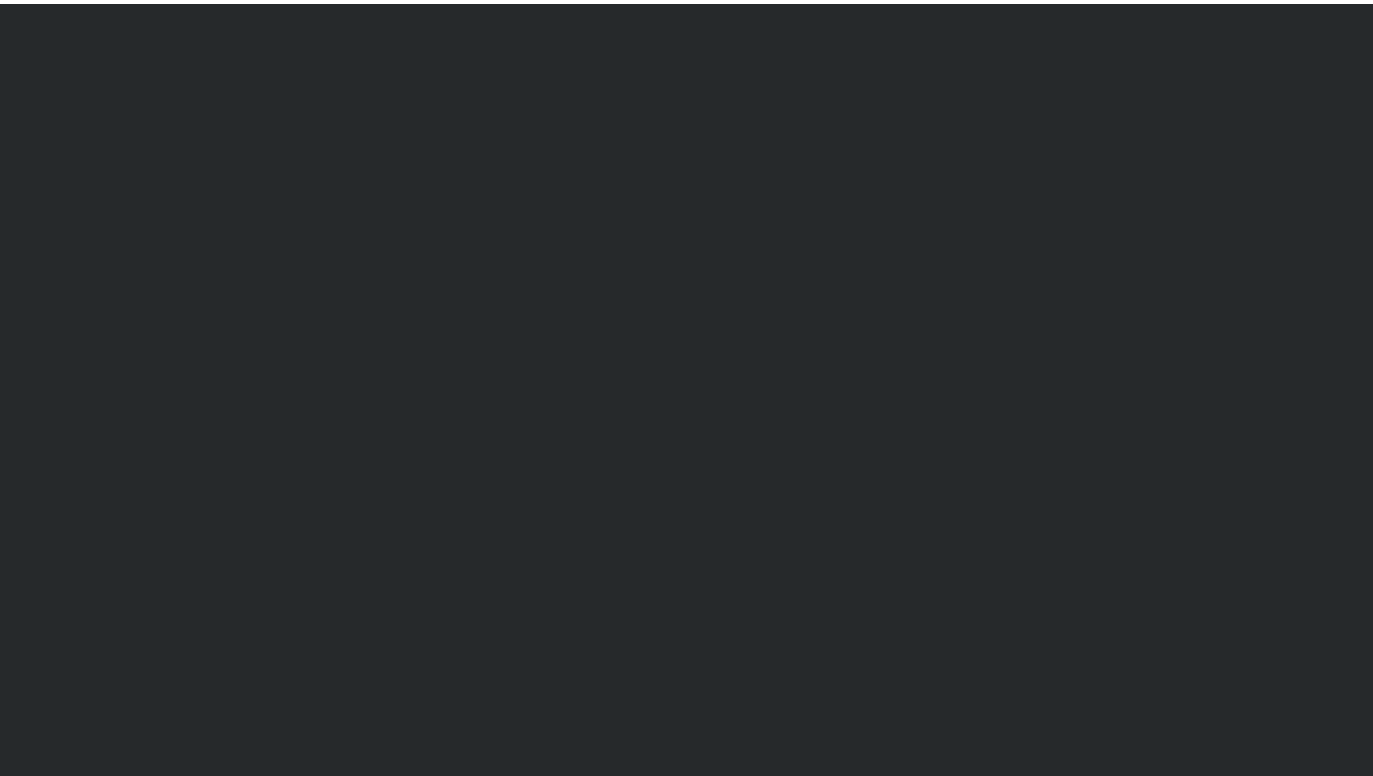
Craig Webb | President, Webb Analytics



Day 1



Day 2



Day 3



SPEAKERS

Mark Boud	Principal, Robbins Boud Real Estate Economics
Joseph Briggs	Economist, Goldman Sachs; Former Economist, Federal Reserve Board of Governors
Greg Brooks	President, Building Supply Channel
John Burns	CEO, John Burns Real Estate Consulting
Michael Collins	Principal, Building Industry Advisors
Rick Davis	President, Building Leaders
Maged Diab	Operating Partner, Building Industry Partners; Former President, MiTek
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Peter Ganahl	CEO, Ganahl Lumber
Patrick Garcia	VP, Innovation and Technology Adoption, SRS Distribution
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Kevin Hancock	Chairman & CEO, Hancock Lumber
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Butch Reimer	President, Tru Cabinetry
Mark Richardson	Senior Research Fellow, Joint Center for Housing Studies of Harvard University
Rick Russell	President, Millard Lumber
Timothy Ryan	Executive Partner & Corporate Finance Specialist, Holland & Knight
Steve Sallah	President, LBM Advantage
Amy Smiley	VP of Marketing, 84 Lumber
Jeff Smith	CFO, Kodiak Building Partners
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Steve Swinney	CEO, Kodiak Building Partners
Jim Tobin	EVP & Chief Lobbyist, National Association of Home Builders
Jon Vaughan	CEO, Brand Vaughan Lumber
Craig Webb	President, Webb Analytics
Margaret Whelan	Founder & CEO, Whelan Advisory
Wendy Whiteash	CHRO & EVP, Culture, U.S. LBM

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Charlie Bradburn	President, Lyman Lumber	Todd Drummond	President, Todd Drummond Consulting
Craig Bradshaw	President, Mead Lumber	Thea Dudley	Owner, Pocket Protectors
Luis Perez-Breva	MIT	Mike Dykstra	CEO, Zeeland Lumber
Chris Brewer	Manager, Berry Home Centers	Matt Endriss	General Manager, Central Valley
Robert Brooks	Director of LMS Development, BSCi	Jim Enter	Founder, American Association of Roundtables
Michele Burger	VP, Misura Group	Yordanos Eyoel	Partner, New Profit
True Carr	President and Owner, Alliance Lumber	Rob Felton	Advisory Partner, Cotton Creek Capital
Jim Cavanaugh	Former President, Mill Creek Lumber	Ryan Flom	Chief Marketing Officer, Softwood Lumber Board
Pete Chambers	Managing Partner, Chambers Interests	Walter Foxworth	Chairman, Foxworth-Galbraith Lumber
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		Ben Glatzer	CEO, CareSearchers

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Beau Hayes	President, Jones Hartz Building Supply	Meagan McCoy Jones	SVP & COO, McCoy's Building Supply
Christopher Herbert	Managing Director, Joint Center for Housing Studies of Harvard University	Mike McDole	SVP of Sales, National Lumber
Ellice Herman	Office Manager, Building Leaders	Matt McDonald	President, Sunpro
Jerry Higman	CEO, Reliable Wholesale Lumber	Thomas McManus	President, Cape Cod Lumber
Rankin Hobbs	Partner and Co-Founder, Chambers Interests	Paul Mills	Manager, Home Lumber of New Haven
John Horoho	Manager, Sanford & Hawley	Marc Mizgorski	President, Hayward Lumber
Christine Hunter	SVP for Human Resources, Central Valley	Fran Monk	Marketing Director, Lumbermens Merchandising Corporation
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Tim Johnson	VP, Southeastern Operations LBM Advantage	Nali Mullan	Marketing Specialist, Misura Group
Ronald Kalinowski	VP of Sales, Cape Cod Lumber	David Myron	Editor, Hanley Wood Media
Alan Khazei	Social Entrepreneur, Current Candidate for U.S. Congress	Gary Nackers	SVP of LBM, Do it Best
Vanessa Kirsch	Founder & CEO, New Profit	Cody Nuernberg	President, Northwestern Lumber Association
Rick Kolaczewski	Former CFO, U.S. LBM	Erin O'Connor	Director, Education & Development, Northeastern Retail Lumber Association
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Kyle Little	COO, Sherwood Lumber	Jerry Pilman	Director of Continuous Improvement, Wilson Lumber
Jess Lohse	Assistant Executive Director, Structural Building Components Association	Gary Poulos	CEO, Mill Creek Lumber
Todd London	SVP of Sales and Marketing, Sherwood Lumber	Dave Reichert	President, Davis-Hawn Lumber

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Joel Russell	COO, Millard Lumber	Bill Tucker	Owner, E3 Consulting
Paul Ryan	SVP of Finance & Technology, Lumbermens Merchandising Corporation	Susie Van	Director of Education & Training, Building Material Suppliers Association
Robert Sanford	President, Sanford & Hawley	Rick Vancil	EVP, Alexander Lumber
Jessica Scerri	President, Golden State Lumber	Chip Vaughan	Managing Principal, Brand Vaughan Lumber
Lonnie Schield	Operating Partner, Building Industry Partners	Chris Vaughan	Marketing & Communications Manager, Cape Cod Lumber
Laura Schreiner	Marketing Manager, Misura Group	Casey Voorhees	Executive Director, Western Building Material Association
Lynn Schwarz	President, Building Material Suppliers Association	Bill Wallace	President & CEO, Big C Lumber
Anthony Scioli	Partner, Kutak Rock	Tammy Wandler-Ginexi	Regional Director, Northeastern Retail Lumber Association
Mark Seigle	Owner, Seigle's Cabinet Center	Katherine Whittemore	Owner, Home Central
Michael Senesac	Inside Sales, Big C Lumber	Stephen Wiechens	VP, Secretary, Treasurer, Manning Building Supplies
John Sewall	President, The Detering Company	Robb Wilson	CEO, Wilson Lumber
Kayvon Shahbaz	CFO & SVP, Finance Chambers Interests	Tim Wirth	Director of Communications, U.S. LBM
Sean Shields	Director of Communications, Qualtim	Michele Wisch Robin	Advisor, Building Industry Partners
Cason Shrode	President, Jones Legacy Ventures	Wayne Withers	CEO, West Coast Framing
Richie Siewers	Co-Owner, Siewers Lumber	Greg Wright	Owner, J.P. Hart Lumber
Paulo Sitolini	COO, Hayward Lumber	Mireya Zapata	EVP, Lumbermen's Association of Texas & Louisiana
Matt Sivewright	Owner, EverFence		
Greg Smith	President, Gulf & Basco		
Michael Sonderman	Operations Manager, Ridgefield Supply		
Eric Spencer	Owner, Spencer Home Center		
Jim Stockman	EVP of Business Development & National Sales, American Construction Source		
Jeff Taake	VP of Manufacturing & Commercial Sales, Mead Lumber		
Hamid Taha	President, Alpine Lumber		
Rick Thompson	VP, Gilcrest/Jewett Lumber		
Sean Tighe	SVP, Lumbermens Merchandising Corporation		
Mark Torrisi	Co-Owner, Jackson Lumber		

ABOUT US



Building Industry Partners (BIP) is the leading private equity investment firm focused on the U.S. building industry. Since its 2008 founding, BIP Principals have sponsored some of the marquee and fastest-growing middle-market manufacturing, distribution, and service businesses in the U.S. building industry, including: U.S. LBM Holdings, Kodiak Building Partners, Rugby Architectural Building Products, Homewood Holdings, United Cabinet Holdings, and U.S. Fence Solutions.

BIP's investment and business principles are: Unwavering integrity; a people-first approach to business; alignment of interests with our partners; respect for the advantages of local, entrepreneurial businesses; and a prudent approach to risk and reward.

In 2020, under the leadership of Founder Matt Ogden, BIP kicked off the process of relaunching the firm to accelerate and scale our people-first investment and impact initiatives. BIP is engaging like-minded business and thought leaders who share a vision of advancing the building industry and its workforce over the next decade.

To learn more about BIP, or for contact information, please visit [bipartners.com](#).

Webb Analytics

Webb Analytics helps construction supply insiders and investors make better strategic and tactical decisions by identifying and explaining the trends, threats, and opportunities that shape their business. Its key offerings include custom research, custom content, strategic consulting, data, analysis, and business development services. Its president is Craig Webb, the longtime editor of ProSales and Remodeling magazines. To learn more, visit [webbanalytics.com](#) or call [\(800\) 455-4555](#).

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