

➤EQUIPPED'26



KEY TAKEAWAYS & ACTION GUIDE

*Practical Workflows and Immediate Operational Wins for
Dealership and Rental Leadership*



Looking Back at EQUIPPED' 26

Dear Valued Customer,

On behalf of the entire Texada team, thank you for joining us in Indianapolis for EQUIPPED '26. Whether you flew across the country or drove across town, taking days away from your business is a big commitment, and we are grateful you spent that time with us.

Our goal for EQUIPPED was simple: create an open, honest room where equipment leaders could see where our products are heading, share real shop and yard hurdles, and tell us directly what is working and what is not.

Across every keynote, roundtable, and hallway chat, one take-away came up consistently: equipment teams are being asked to handle more volume with fewer skilled people. Our mission is to give your team practical software superpowers so they can **Know More** about their fleet and customers, **Do More** to respond quickly in the field, and **Do Less** manual paperwork and processes.

We built this Guide so you can easily share these operational quick wins and platform updates with your branch managers, service coordinators, and sales reps.

Thank you for your partnership and trust. We are fully committed to making your software simpler, faster, and more reliable every single day.

Warm regards,

Matt Harris
CEO, Texada Software



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The Value & Impact of EQUIPPED

96%
**Company
Attendance**

Organizations

46

Representing market leaders
across North America.

Geographic Reach

22

Across 18 U.S. states and 4
Canadian provinces.

Audience Composition

Dealerships



Rental Houses



Partners and Industry Guests



Highlights

20

Programmed Sessions: Covering keynotes, technical breakouts, hands-on labs, and product roadmaps across 4 specialized tracks.

10+

Hours of Networking: Connecting equipment leaders across evening receptions, happy hours, and executive dinners.

13+

Hours of High-Touch Collaboration: Dedicated 1-on-1 advisory in the Expert Lounge

Main Stage Highlights

Unlocking Practical
Superpowers for Your Team

Connection in the Age of AI: The Texada Vision

Presenter: Matt Harris, CEO

Real business growth is driven by how your people work together, not just the software you buy. Technology should adapt to your team's natural strengths and eliminate everyday friction so your business stays powerful together.

Culture Drives Real Change

Culture is what happens when leadership is not in the room. Real innovation happens when equipment veterans team up directly with software builders in an environment where people feel safe testing new workflows, learning from mistakes, and improving together.

The 4 A's of True Adoption

Software only creates value when employees actually use it. Every rollout needs four things:

Awesome

Solve real, painful daily problems.

Awareness

Make sure teams know the tool exists.

Access

Make it frictionless to open and log into.

Activation

Build daily habits so it gets used every morning.

Start in the Quick-Win Zone

Adopting AI does not mean overhauling your entire operation overnight. Start with small, immediate wins that help individual people right away, like voice notes that save mechanics 45 minutes of daily typing before tackling complex automation.

Play to Natural Human Strengths

Every person solves problems, communicates, and works differently. When software matches how people naturally operate, sales, service, and yard teams can do significantly more without burning out.

Super Powering Equipment Businesses

Presenter: Ben Cox, Chief Product Officer

Equipment demand is climbing, but dealerships and rental houses are held back by severe technician and skilled labor shortages. The solution is not asking staff to work longer hours, but giving them practical superpowers to handle more work without clerical burnout.

The Core Framework: Know More, Do More, Do Less

Every update across your tools connects back to three clear goals:

Know More

See customer machine histories, active regional job sites, and daily priority tasks right away.

Do More

Respond to customers in minutes with faster quotes, quicker turnarounds, and accurate answers.

Do Less

Cut out repetitive administrative chores and copy-pasting that do not add value for customers.

Everyday Superpowers Across Every Role

- **For Sales Reps:** Live market intelligence feeds directly into your CRM, letting reps reach project contractors before competitors even know a job exists.
- **For Service Techs & Coordinators:** Mechanics speak their notes into their phone while smart voice tools clean up the wording automatically. Approved maintenance quotes push straight into work orders with zero manual retyping.
- **For Rental & Yard Managers:** Mobile photos compare machine condition between pickup and return in minutes to recover repair costs without customer disputes, while integrated payments eliminate credit card reconciliation headaches.

Leading Your Team Through Transformation

Presenter: Bonnie Crawford, Chief Operating Officer

Software capabilities do not create ROI on their own; value is only realized when frontline teams use the tools every single day. Go-live is just the starting line, and real operational growth requires treating user adoption as an ongoing team journey rather than a one-time IT project.

What Gets in the Way

Mindset Over Software In a live room poll of over 50 equipment leaders, the biggest obstacles to adoption weren't software glitches. They were **cultural inertia, lack of time, and "we've always done it this way" habits**. Real change succeeds only when leadership addresses the **human side of new workflows** early.

Go-Live Is the Starting Line, Not the Finish

Return on investment happens in the **daily habits** of your branch, shop, and yard teams. Unused software and abandoned mobile apps represent **paid-for value waiting to be unlocked**. Driving broad adoption helps your business **handle more volume without immediately hiring more office staff**.

The Four Habits of High-Adoption Teams

Executive Sponsorship:

Leadership clearly explains the "Why" behind new tools and sets the standard for how work gets done.

Champions Everywhere: Name multiple trusted peer champions in every branch. In the post-session poll, creating more branch champions was the single most common commitment leaders pledged to take home

Start Fast, Then Go Broad: Launch core workflows quickly, then steadily expand across service, sales, and counter operations.

Measure and Celebrate: Track daily active usage, solve user confusion early, and openly celebrate quick operational wins.

A True Partnership

Rolling out change is not something equipment businesses have to tackle alone. Texada partners directly with customer teams through dedicated adoption coaching, sharing usage insights, providing role-based training, and mentoring your internal champions to ensure software habits stick long term.

Actionable Key Takeaways

Apply to Your Business Today

Here are the actionable takeaways and immediate quick wins extracted from the EQUIPPED '26 technical breakout sessions. These strategies focus on practical operational improvements that equipment dealerships and rental houses can implement right away.

Rental and Yard Operations

1. Recover Unbilled Damage Automatically and Speed Up Shop Turnaround

Standardize walk-around photos on mobile devices at checkout and return. Built-in **AI Damage Detection** compares before-and-after images in under three minutes, recovering revenue on the 2% to 3% of returns with unbilled damage (\$1,000+ average per incident) and flagging return damage immediately so repairs start on the spot and assets keep turning.

3. Eliminate Lost Tickets with Paperless Dispatch

Send delivery and pickup routes straight to driver mobile devices. Drivers complete digital checklists and capture customer signatures directly on screen, creating an immediate paper trail that stops billing data from slipping through the cracks.

2. Bypass the Counter with Mobile Yard Check-In and Check-Out

Handle customer handoffs directly in the yard while loading or unloading. For established account customers where payment is not required at the counter, staff can complete check-in and checkout inspections straight from mobile devices to eliminate branch office lines completely.

4. Pre-Stage Equipment to Cut Counter Lines

Prepare and stage reserved machines in the yard before the customer arrives. Using live reservation updates on mobile devices cuts counter bottlenecks and gets customers off the yard faster.

Sales and Territory Growth

1. Turn Spoken Notes into Clean Visit Logs With AI Sales Assistant

Let outside reps speak their updates into their phone right from the truck cab. Built-in voice tools clean up rambling notes into clear, professional customer records in seconds, saving reps from typing on small screens.

2. Track Local Jobsites with Projects in CRM

Use project tracking in your CRM to map general contractors, subcontractors, and machinery across active jobs in your territory. Reps can link jobsites directly to customer accounts to engage decision-makers before competitors know the job exists. *(Current functionality in SalesLink)*

3. Optimize Road Travel with "Around Me" GPS Views

Give outside reps a live map of active projects and accounts near their current location. Reps can turn unexpected cancellations into productive drop-in visits instead of driving back to the branch.

4. Connect Field Sales to the Counter with Field Sales Tracker

Equip outside sales reps with Texada's new lightweight mobile tool to view live contracts on site, draft AI follow-ups, and assign tasks directly to the back office without phone tag.

Take action: *Eligible rental operations can launch a free pilot with live customer data in under two weeks—ask your Account Manager to activate it.*

Customer Self-Service and Office Tools

1. Give Customers 24/7 Jobsite Portals

Provide client project managers and site supervisors direct online portal access. Customers can review active contracts, request service, and call machines off-rent directly from their phones, automatically creating tasks in your branch dispatch queue.

3. Eliminate User Setup Overhead with Customer Admin Access

Empower client administrators to manage user access and role permissions for their own company. Customers can grant portal privileges directly to their site foremen and accounting staff without calling your branch to create logins or update permissions.

2. Speed Up Cash Flow with Online Accounting Access

Let customer accounts payable teams review open balances, submit invoice questions, and pay bills online securely without calling your accounting staff.

Putting These to Work: Have questions about implementing these tools or turning on new features? Reach out directly to your Texada account team to get started.

What We Heard at EQUIPPED' 26

Attendee Feedback and Quotes

"**Attending allowed me to fall back in love with Texada.** I got to see all Texada can do, hear all that is coming down the pipeline, remember how we are aligned, and ask for support in person."

"Learned a lot and **met a lot of people facing similar challenges** that we are currently facing. **Learned a lot of features of what Texada can do.**"

"**I find Dealership best practice sessions valuable** and provide great insight and value. The round table discussions always seem to prove quite insightful. (...)"

"[My most valuable takeaway was] hearing Texada's commitment to **continuously improving this enhancement.**"

"I had a great time and **learned about the different product capabilities.** "

"...if reps realized the value, that they would **save themselves a considerable amount of time on the learning curve**, they would all want to do it [attend EQUIPPED]."

"**Content and presentation top notch.** Other dealer participation allows for **great insight and networking.** "

"I had a great time and **learned about the different product capabilities.** "

"My suggestion to a rep is **come to the conference**, do some of the sessions with experts, go after information, pursue it—and this **team will back you.** Everyone that I've experienced in the conference from the Texada team has been **incredibly helpful** and right there available for a conversation or a how-to."

Texada Ascend

Built by Experts.

Powered by AI.

Texada Ascend: The Equipment Industry Growth Platform

As previewed on stage at EQUIPPED, Texada Ascend is the equipment industry growth platform, powered by AI and built specifically for equipment businesses. Ascend connects every team, workflow, and decision across rental, sales, service, parts, and finance together so teams can perform at a higher level and businesses can grow with confidence.

What It Means for Your Business

1. Complete Equipment Operations. One Integrated Platform.

Connect rental, sales, service, parts, equipment, and financial operations together in one modern experience. Teams gain shared visibility across the business at every stage of the equipment lifecycle.

2. Industry Intelligence, Powered by AI

Built from an AI native technology with deep equipment industry expertise, Ascend delivers connected intelligence grounded in how rental companies and dealerships actually operate.

3. Gives Every Team the Power to Perform at a Higher Level

Ascend connects data, workflows, and intelligence to help teams work faster, make better informed decisions, and understand what needs attention. It puts intelligence into the flow of work while keeping human expertise at the center of the operation.

4. Modern by Design, Proven Where It Matters

Ascend delivers the speed and responsiveness of a modern AI native platform with the security, reliability, and operational depth required to run mission-critical operations. Modernization without compromise.

Coming Soon!

Keep an eye out over the coming weeks for official announcements and everything you need to transition to Texada Ascend!

The 2026 Customer Awards

Honoring Outstanding Growth, and Measurable Success Across Our Rental and Dealer Network

Our annual awards celebrate the dealerships & rental teams who push our platform forward, share best practices, and deliver real results every day.

The Beacon Award: For Outstanding Leadership and Advocacy

Rental Winner **Northstar Equipment**

Acted as great advocates within their broader organization connecting us to new potential customers including running their own demos.

Dealer Winner **JA Riggs**

Provided significant feedback both in pilots and throughout events with panel participation and sharing metrics showcasing value being created for them.

The Horizon Award: Extraordinary Growth and User Expansion

Rental Winner **TOC Equipment Rentals**

Delivered an impressive 65% users growth while keeping their everyday operations running smoothly.

Dealer Winner **Butler Machinery**

Grew their users by an incredible 368%, setting a whole new bar for expansion.

The Equipped Award: For Ecosystem Mastery and Operational Integration

Rental Winner **Kilmer / Brunswick**

Showed incredible grit and resilience by bringing nearly 100 users up to speed in a fast growing organization while integrating new businesses.

Dealer Winner **Holt of CA**

Stepped up as true early adopters, leading the way with SAQ to Work Order.

The Catalyst Award: For Exceptional Community and Partnership Engagement

Rental Winner

ERI

Incredible collaborative partners who shared hands-on feedback to help us upgrade the Rental Board and rebuild our customer training programs for the better.

Dealer Winner

Yes Equipment

Partnered with us developing our Parts & Service capabilities and paving the way for our new Analytics capabilities.

The Trailblazer Award: For Pioneering Operational Excellence

Rental Winner

Total Rentals

Used the platform to deliver 80% asset utilization rate to grow the business.

Dealer Winner

Wagner

Recognized for their work with repair options and standard jobs, built on a solid repair process started back in the 90s. They are also our showcase dealer for rolling out SVL, actively helping peer dealerships learn their rollout strategy.



EQUIPPED'26

We hope this takeaways booklet was helpful for you and your team.

If you would like to explore more materials from the event, you can find everything at texadasoftware.com/equipped26/.

LET'S TALK

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