



# IRON CIRCLE

WHERE PERFORMANCE IS FORGED

**The equipment industry is facing disruption on every front.  
From shifting manufacturer expectations and dealer consolidation to succession transitions and rising operational costs.**

In response, NAEDA and Dealer Institute (DI) are launching Iron Circle: a next-generation performance group program forged in accountability.

Iron Circle is not a traditional 20 Group; it is a high-performance peer group focused on measurable improvement, operational discipline, and data-driven coaching. The program is designed exclusively for equipment dealers who are ready to be challenged, evaluated, and supported by the best minds in the industry.

**Dealers who participate in Iron Circle will receive:**

- Powerful peer benchmarking and composite financial reports
- Private performance reviews with an industry expert
- Structured hot seat discussions and accountability consequences
- Year-round support from Dealer Institute experts and consultants

Iron Circle exists to elevate dealership performance and leadership across North America. Its mission is to help dealers sharpen their business strategies, improve profitability, and embed a culture of continuous improvement through structured peer accountability.

# PROGRAM OBJECTIVES

## THE PROGRAM IS GROUNDED IN FOUR PRIMARY OBJECTIVES:

### 1. Drive Measurable Profitability Gains

Every Iron Circle dealer receives targeted financial benchmarks and performance data that identify both strengths and gaps. Group discussions center on margin growth, expense control, absorption rates, and total business health.

### 2. Build a Culture of Peer Accountability

Iron Circle is not just about sharing ideas — it's about facing the truth. Dealers are expected to come prepared, present openly, and follow through on commitments. Hot seats and follow-up consequences ensure accountability is real and sustained.

### 3. Strengthen Leadership Discipline

Each meeting is designed to develop the mindset and discipline of high-performing leaders. Sessions challenge decision-making logic, time management, ownership succession, and team development through focused discussions.

### 4. Harness NAEDA and Dealer Institute Expertise

Iron Circle groups are moderated by trained Dealer Institute consultants who facilitate honest discussion, reinforce strategy, and provide real-world perspective. Group members also gain access to DI tools, templates, and advisory services throughout the year.

# KEY DIFFERENTIATORS

The Dealer Institute Iron Circle Performance Groups are engineered to deliver sharper insight, deeper accountability, and more impactful results than any existing peer groups. Key differentiators include:

## **The Iron Circle Accountability System**

A proven performance framework that brings structure and rigor to each group. Members will complete pre-work, participate in hot seat reviews, and track commitments using follow-up systems designed to ensure progress and transparency.

## **Industry-Trained Facilitators**

Meetings are led by experienced NAEDA Dealer Institute trainers, specialists who bring deep dealership knowledge, advanced facilitation skills, and actionable insights to every session.

## **Modern Performance Metrics**

Tailored KPI scorecards for OPE and Ag groups will be used to compare financials, productivity, service efficiency, and sales performance in real time — ensuring relevance and driving results.

## **Full Department Involvement for Ag Dealers**

Department-level engagement in Ag groups means more collaboration and accountability across Parts, Service, and Wholegoods, while OPE groups focus on high-level business leadership and execution.

## **Smaller, More Engaged Groups**

Group sizes are intentionally limited (6-7 for Ag, 10-12 for OPE) to promote focused discussion, personalized feedback, and peer-to-peer trust and accountability.

## **Action-Oriented Meeting Design**

Sessions end with clear, time-bound action items and peer commitments, pushing members to move from discussion to execution with measurable outcomes.

## **Strategic Positioning Under NAEDA**

Backed by the credibility, reach, and advocacy strength of NAEDA, this program offers more than peer learning; it aligns dealers with a national movement of performance excellence.

## **Advanced, Progressive Chart of Accounts**

Each group will utilize a robust, custom-built chart of accounts that goes far beyond the capabilities of most dealers' internal systems. These financial templates will be unlocked in phases, starting with foundational metrics and gradually expanding into advanced measurables as the group matures. This staged release ensures that financial literacy and insight grow alongside dealer performance.

# GROUP STRUCTURE

Iron Circle is intentionally divided into two distinct tracks, one for Agricultural (Ag) dealers and one for Outdoor Power Equipment (OPE) dealers. Each group is designed to reflect the operational complexity, staffing model, and performance benchmarks unique to that segment.

This separation ensures that all benchmarking, discussions, and improvement plans are relevant, realistic, and focused on the real-world pressures each type of dealership faces.

## AG DEALER PERFORMANCE GROUP

Ag groups are designed for large-scale dealerships that often include multiple locations, departmental layers, and complex wholegoods strategies. These businesses require a deeper level of operational alignment and departmental accountability.

### **Group Size:**

- 6–7 dealerships per group (small by design to allow for deep analysis and department-level conversation)

### **Attendees:**

- Dealer Principal
- Department Managers: Parts, Service, and Wholegoods (4 representatives per dealer encouraged)

### **Focus Areas:**

- Departmental KPI performance
- Internal communication and margin protection
- Succession, territory growth, and scale readiness

### **Ideal Participants:**

Ag dealerships with revenue ranging from \$20 million to \$1 billion+, seeking structured peer insight to improve departmental integration, labor recovery, inventory efficiency, and long-term valuation.

Each group is moderated by an experienced Dealer Institute facilitator who understands the nuance of that segment and is responsible for keeping discussions focused, transparent, and productive.

This structure ensures that no dealer is ever in a group where their business model feels irrelevant or where their challenges are misunderstood. Whether you're in the field or behind the desk, Iron Circle connects you to peers who actually live your reality.

# GROUP STRUCTURE

## OUTDOOR POWER (OPE) DEALER PERFORMANCE GROUP

OPE groups are designed for mid-size, often family-run businesses where leadership is concentrated and operational roles overlap. These groups move faster, address short-term execution, and focus on practical improvements.

**Group Size:**

- 10–12 dealerships per group

**Attendees:**

- Dealer Principal
  - General Manager
- (2 representatives per dealer encouraged)

**Focus Areas:**

- Labor efficiency, service profitability, inventory turns
- Hiring, training, and retention at the store level
- Margin control and seasonal cash flow strategy

**Ideal Participants:**

OPE dealers generating \$1–\$50 million+ annually looking to benefit from performance benchmarking and operational guardrails that create clarity and growth without overbuilding infrastructure.

Each group is moderated by an experienced Dealer Institute facilitator who understands the nuance of that segment and is responsible for keeping discussions focused, transparent, and productive.

This structure ensures that no dealer is ever in a group where their business model feels irrelevant or where their challenges are misunderstood. Whether you're in the field or behind the desk, Iron Circle connects you to peers who actually live your reality.

# ANNUAL MEETING FRAMEWORK

The strength of Iron Circle lies not just in what is measured — but how often it's addressed, how clearly it's discussed, and how consistently it's reinforced. Each Iron Circle group operates on a clear annual rhythm that ensures consistent accountability, peer engagement, and progress tracking.

This cadence is purpose-built to allow dealers enough time between meetings to implement real changes while providing frequent enough contact to maintain urgency and follow-through.

Each dealer group participates in the following touchpoints every year:

## TWO IN-PERSON GROUP MEETINGS

Held twice a year at rotating regional locations and includes benchmark reviews, hot seats, and strategic discussion. Enforced commitments and data visibility prevent backsliding and excuses. Iron Circle ensures that transparency and performance replace complacency. This structure drives real change.

Hot seats are mandatory and data-driven, not voluntary storytelling. One dealer is selected per meeting based on lagging performance or broken commitments. Hot Seat Format

- Present the key performance issue(s)
- Explain why performance fell short
- Own prior actions (or inactions)
- Detail what will be done before the next meeting
- Moderator and peers respond with challenge/support

## ONE PRIVATE VIRTUAL PERFORMANCE REVIEW

A 60 to 90 minute one-on-one call with moderator.

- Confidential discussion of financial performance and strategic priorities
- Review of KPIs, department health, and dealer-specific challenges
- Goal setting and alignment between dealer and facilitator
- Preparation for the next group session
- Opportunity for sensitive topics that require privacy

# ANNUAL MEETING FRAMEWORK

## QUARTERLY FINANCIAL SUBMISSIONS

Location-level benchmarking is the foundation of Iron Circle's value. Without meaningful comparisons, peer learning becomes guesswork — and accountability becomes subjective. That's why Iron Circle requires every member to submit standardized financial and operational data on a quarterly basis, and why every hot seat and corrective plan is tied back to hard numbers.

This is not just financial transparency — it's operational discipline.

All Iron Circle dealers are required to submit KPI data four times per year using a standardized Excel-based reporting template. Data is collected at the location level and then aggregated into a dealer-wide composite to enable peer benchmarking.

## CONFIDENTIALITY & TRUST

All submissions are confidential within the group. No dealership names are listed in composite rankings. Only the moderator and internal Dealer Institute staff have access to the raw data.

Dealers are required to sign a confidentiality agreement as part of their onboarding and are reminded at each meeting that this trust is what makes real sharing — and real change — possible.

## WHY THIS MATTERS

Other peer groups may rely on voluntary sharing, anecdotal input, or one-time annual financials. Iron Circle is different. We track progress quarter to quarter, identify patterns, and use that data to guide hot seats, consequences, and improvement plans.

If you're not tracking it, you're not improving it. And if you're not improving, you don't belong in Iron Circle.

# MEMBER COMMITMENT

Membership in Iron Circle is not passive — it's an active commitment to transparency, growth, and peer accountability. To protect the integrity of the group and ensure meaningful participation, each member must agree to a clearly defined set of expectations.

## MEMBER COMMITMENTS

- Submit accurate, location-level KPI data quarterly
- Attend all scheduled meetings (two in-person and one virtual per year)
- Participate in hot seat as required
- Complete action plans and follow through on commitments
- Provide peer support and honest feedback
- Abide by the confidentiality and conduct standards at all times

# ARE YOU READY TO GET STARTED?

## FOR MORE INFORMATION AND TO SIGN UP

If you would like additional information, have any questions or are ready to sign up, please contact your NAEDA Dealer Development Manager. If you do not have a direct contact, reach out to us to get connected with someone on the Dealer Institute Team!

Email [INFO@NAEDA.COM](mailto:INFO@NAEDA.COM)

Phone [U.S. \(800\) 762-5616](tel:18007625616)  
[CANADA \(800\) 661-2452](tel:18006612452)

Sign Up [www.dealerinstitute.org/iron-circle-performance-groups/](http://www.dealerinstitute.org/iron-circle-performance-groups/)



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