

FALL 2016

# InTouch

The Official Magazine of NAMA



## Fly-In 2016





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## Delivering Your Brand Experience

Carla Balakgie, President & Chief Executive Officer of NAMA

the 30-year old company's premier retail locations—were remarkable. Both were impressive in design, product offerings, amenities and most of all, the customer experience they provide.

With customers ranging from the estimable Jane Austen and Charles II Earl Grey of England to today's millennials, Twinings has worked to balance a renowned legacy with innovative new products to meet the demands of today's consumers. The company's centuries-old London store blends tradition and history with state of the art features such as its Loose Tea Bar and masterclass cuppings, providing patrons with a customized experience they won't soon forget.

Nespresso's history is a little more condensed, but in its three decades it has built a reputation as a global leader in specialty coffee, empowering its customers to be their own baristas. Its premier Vienna retail space and first-ever Nespresso Café boasts walls of product, a tasting bar

and a special area complete with self-checkout kiosks for regular Nespresso Club members, delivering a frictionless retail experience. The latter serves up a new take on customer loyalty, engagement and unattended retail in a traditional brick and mortar environment.



*Whether a brand's story has unfolded over 300 years, 30 years or is just in its first chapter, delivering on its promise to customers through a positive experience is paramount.*

While these are just two examples of dynamic environments bringing brands to life, the focus is clear: delivering a unique, memorable and personalized customer experience is essential to success.

This summer, I had the pleasure of visiting two iconic global brands that also happen to be NAMA member companies: Twinings and Nespresso. The Twinings' flagship store in London—a landmark since 1706—and Nespresso's Vienna boutique—one of



Jerry Wilson, a featured speaker at NAMA's Executive Forum 2016, posits that "Brand = Promise + Experience."

Whether a brand's story has unfolded over 300 years, 30 years or is just in its first chapter, delivering on its promise to customers through a positive experience is paramount.

So how can you build your distinctive brand? Consider the coffee service channel which is replete with opportunities to deliver a "WOW" customer experience. It's been proven – through both mainstream and NAMA's channel-specific research – that bringing the coffee house experience into the workplace increases consumption and

revenue. Consumers have an appetite for a wide variety of specialty coffee and tea, and crave a change of scenery from their desks and offices. The coffee house feel is no longer an abstract concept, **it's here and it's happening now**, and our coffee service members are poised to leverage this trend to grow their businesses.

To that end, we've designed a CTW 2016 education lineup dedicated to the theme of the *Workplace Café of Today*. The dynamic sessions will deep dive into how to create an inviting breakroom—a destination where employees want to gather to socialize, share ideas and innovate over their favorite coffee or tea. Featured experts will address menu,

design, branding and other trends of today's Workplace Café, and operators also will hear directly from industry colleagues on best practices during a specially-designed roundtable.


What does this mean for you? Business growth opportunities! Join us at CTW, November 8-10 at the Gaylord Opryland Hotel, to learn more about bringing your brand to life and creating a compelling customer experience for your customers.

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# How to Turn a One-Time Buyer Into a Lifetime Buyer

Dan Mathews, Jr., NAMA Executive VP & Chief Operating Officer

Chip Bell, author and customer service expert, has said, “Loyal customers, they don’t just come back, they don’t simply recommend you, they insist that their friends do business with you.” It’s no secret that there’s much to be gained from a positive and long-standing customer relationship.

Our industry serves customers in a different way than most. We deliver their snacks, beverages and a whole lot more, and we meet them where they are. School, work, hospitals, hotels, airports—you name it, we service it. But ultimately, the product we deliver is convenience. We make our customers’ lives better by making them a little easier, a little more seamless, a little more productive each day.

To continue bettering the lives of our customers and to grow our industry, we must earnestly, creatively and actively engage our customers to gain their loyalty—this is our objective every day here at NAMA. In this article, Benoit Gruber shares tips on how to increase your ROI by investing in your customers and their experience.

Customer service—both good and bad—has a long-lasting impact on revenue. Today, customers can immediately go online to voice frustrations and discontent with a brand. With online purchases and competitor information easily available, a business’s time frame to please customers during the purchasing phase is short. It’s up to each business to make sure customers are happy at every stage in order to gain repeat business. Now more than ever, businesses must create a strategy to build relationships that result in a lifetime of purchasing. With that in mind, here are a few tips to turn a one-time buyer into a lifetime buyer:

**1. Turn a negative experience into a positive one.** While we hate to accept it, mistakes are inevitable. However, these unfavorable experiences can be seen as an opportunity to show customers why their business matters. By owning up and making up for a mistake, businesses gain the respect of customers who feel listened to.

Take steps to make customers feel special by genuinely apologizing and offering a refund, credit or a discount toward a future purchase to make up for the error. Who doesn’t love discounts and credits? More importantly, don’t forget the next step: Learn from mistakes and make changes to ensure they don’t happen again.

**2. Minimize the time and effort it takes for customers to make contact.** No one likes sitting on hold for lengthy periods of time only to be redirected multiple times to hopefully reach the right department. Make it easy for customers to get the

answers they are looking for. Do away with complicated automated directories and recordings, and ensure customer service personnel are educated on how to answer any question a customer may have.

Also important—make it simple for customers to make contact by having easy-to-find contact information on the company website and in multiple forms, like phone number, email address and social media channels.

**3. Make interactions human—not robotic.** Interacting with customers in a “corporate,” overly formal tone is something of the past. Customers want friendly engagements that make interactions enjoyable and not come across cold-hearted.

These friendly interactions shouldn’t only occur in person, but across all interactions with customers, including emails, phone calls and social media exchanges. By humanizing customer interaction, a business will eliminate the irritations that repeat customers might feel when reaching out to a company.

**4. Build customer relationships by harnessing a company’s knowledge.**

Repeat customers give businesses the advantage of insight gained through previous interactions. With technology, businesses have a history of prior purchases, requests and feedback.

Businesses should take this information to build long-term relationships by making it easy for customers to make repeat purchases, have payment information on file and set reminders to follow up when a customer’s inventory is low.

**5. Take pride in your brand and customers will, too.**

Having a respected, honest brand is sure to create customer loyalty. It is important for a business to be consistent with their mission statement and with each customer interaction. Employees should be trained on how and what to say to customers to make them come back for more.

People want to feel good and do good in their lives. If doing business with a company leaves them feeling good, it would be hard for them to shop elsewhere.

Now that these tips have been identified, implement one or all of the below tactics to make them actionable:

1. Audit your existing customer service processes by creating an internal review

process or hire an outside customer service auditing company that will assess your program and offer advice on improvements.

2. Implement a brand review by surveying both employees and customers to gauge their view on the company's brand to implement a brand messaging summit. Use these results to steer your overall messaging for both internal and external audiences.

3. Contract with an agency that hires mystery shoppers to purchase products from you to get a professional report on the transaction. Use this as a way to improve your overall customer performance.

4. Identify your latest customers. Is their interaction documented in your system?

If not, take steps to prevent this from happening again.

Customer service experiences have a long-lasting impact for businesses. By incorporating these tips into customer service programs, businesses are better positioned to gain lifetime customers — and with customers for life, businesses are better positioned for lifetime success. ■

**About the Author** - Benoit Gruber joined Sage in 2008 and has been VP of corporate communications and brand for Sage Enterprise-Market Europe and Sage ERP X3 since October 2013. He leads, defines and implements the strategy of corporate and digital communication in cohesion with the overall business strategy.

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# MILLENNIALS: Who They Are and Why We Should Care

Pat Hagerty, NAMA Chair

According to Forbes, millennials — generally defined as those born between the early 1980s and the early 2000s — are the largest generation in U.S. history. They will also receive the greatest transfer of inherited wealth ever. That makes them a powerful consumer segment—one we can't ignore if we want our businesses to grow and thrive.

So how do we better understand this influential group and capture their spending power?

**First, we need to start thinking like millennials.** This means being more flexible and adaptable, particularly when it comes to technology.

I am certainly learning this in my personal life. As my adult children have children themselves, I've shared photos with my friends and colleagues on Facebook. "But Dad, nobody uses Facebook anymore," my youngest daughter recently told me.

Like many of her peers, she has moved on to Snapchat and Instagram for her social sharing. We can use these growing channels, along with Tumblr and Twitter, to reach our millennial customers.

## **Second, we must look at how we can better serve millennials.**

It's no secret that millennials are driving change in a significant way. They're influencing how businesses operate through their unique preferences, lifestyle and spending behaviors.

The good news is our industry is ideally positioned to meet millennial demands.

Take micro markets, which embody NAMA's new tagline, "Bringing Convenience to Life." They meet the needs of customers who are on the go yet still expect options.

Defining what convenience is may be the biggest challenge we face going forward. Is it dry cleaning? Is it office supplies? Is it pantry items? The jury is out, but my money is on those companies who anticipate consumers' most pressing demands.

How about micro kitchens? These free vend environments, found in progressive workplaces such as Google, Amazon and Jet, are growing exponentially. The companies provide good quality, healthier options—exactly what millennials want—and in return, they see higher productivity and employee morale. All for a free Clif Bar.

Guess what? Because it's free, employees will consume more—increasing your business potential and creating a point of differentiation for the employer. It's a slam dunk, an absolute win-win.

Company owners and their employees are looking to us to offer innovation in terms of product and delivery. We could and should be leading this monumental cultural change.

## **Third, we need to listen to our millennial colleagues.**

It is imperative that we spend time with our newest and youngest associates. There is no better "focus group" for business development purposes.

Within NAMA, I'm excited to see our Emerging Leaders Network grow. In fact, we've invited them to participate in long-range planning to ensure that their viewpoints are reflected.

At the Fly-In in Washington, DC this summer, we saw the 20-something staffers on Capitol Hill take full advantage of the free vend options offered to them, and it didn't escape my view that they waited in line at the FitPick machine to get healthier options.

At Vistar, we're noticing this evolution in a big way. We used to say, "Everyone's talking about healthier products but no one's buying them." Guess what? Millennials are buying them — demanding them, actually—and driving a cultural shift that this industry hasn't seen since the demise of cigarettes.

Before I go to load my musical.ly account, I'd like to recommend a book: *Better and Faster: The Proven Path to Unstoppable Ideas*, by Jeremy Gutsche. This insightful read examines traps that can hinder our progress and how to more easily adapt and find new opportunities.

The bottom line is that we need to embrace change in our industry, and millennials may be our best driver.

Speaking of change, join us at CTW to make sure you are up to speed on the latest trends in OCS. For me, cold brew coffee is the big idea that I look forward to learning more about. See you in Music City! ■





# NAMA's Second Annual Fly-In Soars

**M**ore than 260 NAMA members and guests convened in Washington D.C. July 12 and 13 for *NAMA Takes the Hill*, far exceeding the goals for the association's second annual Fly-In, according to Eric Dell, NAMA's SVP of Government Affairs.

"NAMA Takes the Hill proved to be an incredible success in year two, with attendance up by 30 percent over last year," Dell said. "We could not accomplish our goals here in Washington without the tremendous support of our members, sponsors and elected officials – working together is key. Participants met with lawmakers from nearly every state, extending greatly the impact and value of relationships forged as we

work to grow our industry's presence at the federal level. With this scale of involvement, NAMA and our members are really poised to help shape policies affecting the future of the industry," he concluded.

Attendees representing 41 states and Washington D.C. took part in 210 meetings with elected officials and their staffs from both the Senate and the House, meeting with 39 percent of congressional offices overall. Meeting discussions focused on three main issues: nutrition and wellness, the Small Business Regulatory Flexibility Improvements Act and sustainability.

A survey of attendees underscored the Fly-In's impact, with 85 percent of respondents saying they would

recommend the Fly-In to a friend or colleague.

"NAMA has never been so engaged with its community," said participant Amy Bartholomee of Vend Central. "It was very exciting to be a part of something so big and impressive! We are a force in this country, thanks to NAMA's advocacy work."

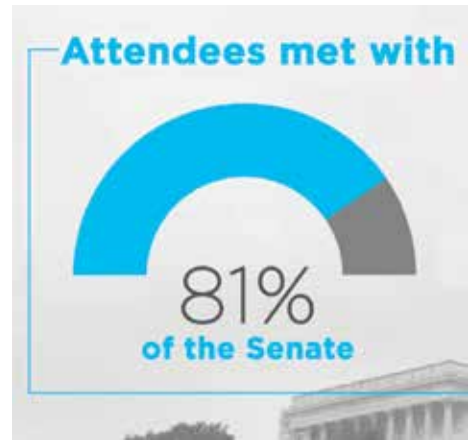
About 400 people, including Fly-In participants and congressional staffers, attended a NAMA-hosted reception at the U.S. House Rayburn Building, showcasing high-tech vending machines stocked with a selection of the industry's better-for-you and FitPick-compliant products, along with traditional favorites and beverages.



Tuesday evening preceding the Capitol Hill meetings, NAMA hosted an advocacy education session featuring FDA representatives on Calorie Disclosure compliance and dinner featuring election analyst Charlie Cook of *The Cook Political Report*. The dinner opened with a military color guard and included a special presentation from Operation Homefront, a national non-profit supporting military families. NAMA partnered with the group to give back to military families by donating backpacks filled with school supplies. As of the Fly-In, NAMA members donated more than 100 backpacks to the cause, including six backpacks presented to a local military family during the dinner. The evening's events concluded with a private tour of the Capitol. ■

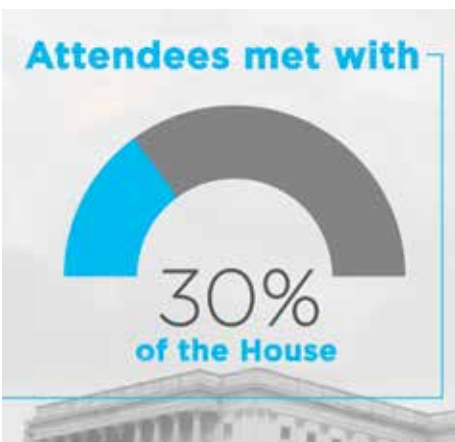
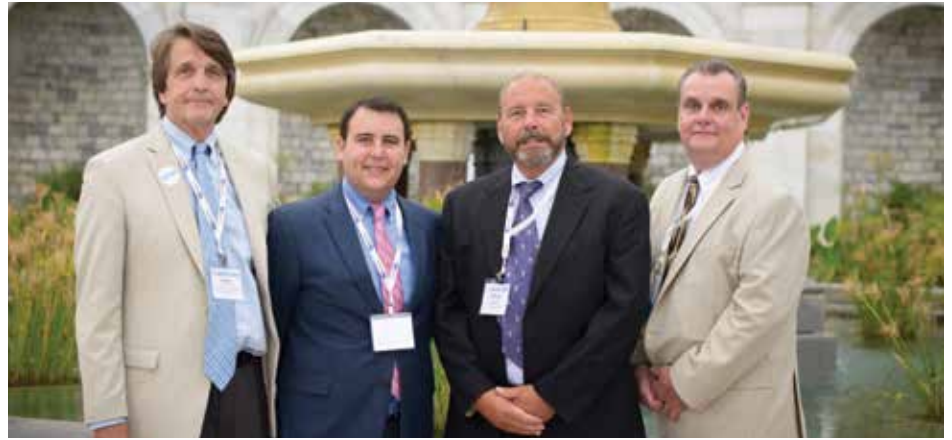
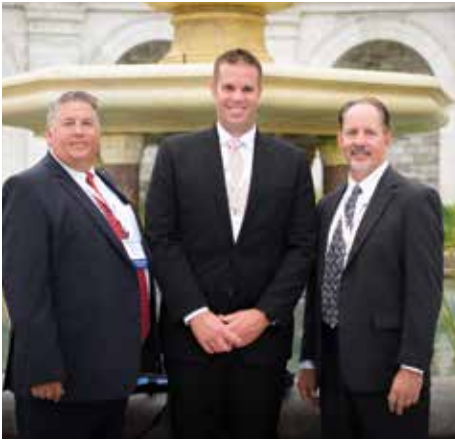


**Check out the Fly-In video here:**  
<https://youtu.be/N5coFu14nrk>











# Grassroots Advocacy Successes Direct Result of DC Fly-In

NAMA members recently hosted several key visits with Congressional leaders at their businesses - a direct result of the work accomplished at the DC Fly-In. These events strengthen the industry's grassroots presence and effectiveness on Capitol Hill, building relationships vital to our work to defend and promote the industry.



From Left: Sandy Larson, Senator Roy Blunt, Karen Webster, Abby Blunt; and Joe Webster.

## Senator Roy Blunt (R-MO)

On September 1, U.S. Senator Roy Blunt toured Newco Enterprises in St. Charles, Missouri, at the invitation of Karen and Joe Webster. Senator Blunt's visit was part of his tour across the state to discuss the importance of supporting small business and reducing regulation.



From Left: Nadi Soltan, Congressman Pete Aguilar, Congressional staffer Erika Flores, Kathy O'Brien, Sandy Larson and Ayad Fargo.

## Congressman Pete Aguilar (D-CA)

Congressman Pete Aguilar visited Biscomerica in Bloomington, California, in August. Kathy O'Brien, VP Sales/Vending at Biscomerica Corporation, hosted the tour of the facility and discussed various issues important to the convenience

services industry. Congressman Aguilar, very impressed with the size - early 300 employees - and scope of the operation, noted that his grandfather was a blind vendor and that he was impressed with the participation in NAMA by blind vendors.



Congressman Joe Wilson with staff member and Crane leadership.

## Congressman Joe Wilson (R-SC)

Congressman Joe Wilson visited Crane Merchandising Systems' facility while traveling through the state on his annual bus tour.



From Left: Elyssa Allahyar-Steiner, Natalie Kamphaus, of Congressman Dave Reichert's staff, Jim Brinton at PIMA Medical School Renton, WA.

## Congressman Dave Reichert (R-WA)

Congressman Dave Reichert's staff member, Natalie Kamphaus, toured Avanti Markets'

headquarters, and also joined Elyssa Allahyar-Steiner and Jim Brinton for a tour of Evergreen Vending. During the event, Natalie got a great overview of the vending and micro market channels. This knowledge will be useful as issues come before Congress that impact the convenience services industry.



From Left: Brad Tedder, President, Crane Merchandising Systems and Emily Lavery, Senator Tim Scott's office.

## Senator Tim Scott (R-SC)

During the recent DC Fly-In, Brad Tedder, President of Crane Merchandising, invited Senator Tim Scott and his policy team to visit Crane Merchandising Systems' Williston facility. The visit by a member of Senator Scott's policy team featured a first-hand look at Crane's vending manufacturing operation.

NAMA members are helping to build and enhance grassroots advocacy momentum. Hosting federal elected officials and their staff members at company locations is priceless to protecting and promoting the industry. Please contact NAMA's Government Affairs division if you would like to host your Member of Congress. ■





**MONDAY, NOVEMBER 7**



**NAMA Foundation Golf Outing**

*(Separate Fee)*

**12:30pm**

**TUESDAY, NOVEMBER 8**

**Registration Open**

**7:00am - 6:00pm**

**Coffee 101: The Elements of Coffee**

**8:00am - 12:30pm**

**(Advance Pre-Paid Session)**

**\$395 members, \$545 non-members**

**Opening Session**

**12:45 - 2:30pm**



**KEYNOTE:  
Seth Mattison**

*Founder and Chief Movement Officer of FutureSight Labs, Seth Mattison is an expert on workplace trends*

*such as talent management; change and innovation; and leadership. He's shared his insight with leaders of big brands including Johnson and Johnson, Kraft Foods, PepsiCo, Cisco, Dow, Disney, and Deloitte.*

*At CTW, listen to Seth discuss how to build relationships in the workplace and the marketplace, how to lead your team, how to connect with your colleagues, and how to ultimately position your organization to win in the new world of work.*

**Education Sessions**

**3:00 - 4:00pm**

- *Fair Trade and Organic: Definitions and Discussion*
- *Energy Star Standards for Batch Brewers*

**4:15 - 5:15pm**

- *Cold Brew Fundamentals*
- *Technology for Coffee Services*

**Election Night Networking Reception w/IBWA**

**5:30 - 7:00pm**

*We have an exciting Election Night Party planned that you will not want to miss! The superiority of Coffee and Tea have long been argued in this industry and we will be moderating a lively debate at the start of this reception to put this matter to rest once and for all. And, if that is not thrilling enough for you, we will be showing the Election results on two large screens at the reception. Definitely a can't miss event!*

WEDNESDAY, NOVEMBER 9



**WIN Run/Walk**  
Walk, run or volunteer  
for this fun 5K

(Separate Fee)

6:30am

**Registration Open**

7:30am - 6:30pm

**Continental Breakfast**

7:30am

**Education Sessions**

8:30 - 9:30am

- *Adapting Specialty Beverages to Coffee Services*
- *Sales Management for Small Businesses*

9:45 - 10:45am

- *Administering Your Small Business*
- *Gamification for Success*

11:00 - 12:00pm

- *Strategies for Pantry Services*

**Trade Show**

12:15 - 5:30pm

**Lunch**

12:15 - 2:00pm

**Networking Reception**

5:30 - 6:30pm

THURSDAY, NOVEMBER 10



## The Workplace Café of Today

**Registration Open**

8:00 - 11:00am

**Education Sessions**

8:30 - 9:30am

• ***New Services for the Workplace Café***

*Consumers are looking for more than great coffee in their cafes. In this session, we'll look at some of the newer trends, including ice, sparkling water, barista services and more.*

• ***Workplace Café Designs***

*Workplace cafes are designed by the world's leading architects and interior designers - and they are becoming an integral feature of today's workplace. In this session, we'll look at some of the cool new designs - including fixtures, lighting, equipment, seating and other elements that make the workplace cafe more than just a breakroom.*

9:45 - 10:45am

• ***The Workplace Café Menu***

*Consumers want their workplace café to be more of a destination, with a variety of offerings that meet their expectations. We'll take a look at the diverse menus being offered in progressive workplace cafés, and how you can easily bring this diversity to your customers.*

• ***Branding in Today's Café***

*The role of brands is evolving - and in today's workplace café, brands can mean different things. In this session, we'll explore the applications and benefits of national brands along with relevant local brands and the role of an "operator brand" to create a competitive advantage in your market.*

**Closing Session - Roundtable**

11:00am - 12:30pm

\*Schedule as of 9/23/16

## 2016 Coffee Legend



### Dean Gilland

"Throughout his tenure at NAMA, Dean has made a tremendous impact on the coffee service channel," said Karen Webster, Coffee Service Committee Chair. "From his leadership in developing CTW and launching the Coffee Service Committee to his warm and friendly style in forging relationships, he has earned the respect and admiration of the industry. We are delighted to honor Dean as the 2016 Coffee Legend."

## NAMA Coffee Services *Hall of Fame*

"We are thrilled to honor these leaders within OCS, each of whom has been integral to its growth," said Karen Webster, CFO of Newco and Coffee Services Committee Chair. "We're not only acknowledging them for their industry contributions, past and present, we're also creating an esteemed place for future awardees. We invite the industry to join us in this celebration at CTW."

**Robert Berliner**  
**Pat Birmingham**  
**Jerry Blum\***  
**Ted Borak\***  
**Charles Brinkman, Sr.\***  
**John Conti**  
**Jeff Dale**  
**Jerry Dale**  
**Kevin Daw**  
**Stuart Daw\***  
**Jean Dominik**  
**David Gellman**  
**Dean Gilland**  
**Ben Ginsberg\***  
**Irv Greif\***  
**Al Hacker\***  
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**David Henchel**  
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**Edward Weber**  
**Joe Webster**  
**Jack West**  
**Anthony Westcott**  
**Tom Williams**  
**James M. Zirakian**  
**James P. Zirakian, Jr.**

\*Deceased



# Vending Calorie Disclosure

## 8 Tips to Assist the Industry in Preparing for the December 1, 2016 Deadline

The deadline for calories to be disclosed for all food and beverage sold from vending machines is **December 1, 2016**.

NAMA's Government Affairs team has put together this list of tips to help NAMA members and their businesses prepare:

**1. FOR OPERATORS:** The compliance deadline is for *food and beverage sold from vending machines* on or after December 1, 2016. Therefore, we urge operators to begin the process now of securing products that have front-of-pack calorie labeling or updating electronic signage or other means of signage to disclose calories for food and beverage products sold in vending machines by December 1.

**2. FOR MANUFACTURERS:** If food and beverage manufacturers are adding front-of-pack calorie disclosure, we urge them to begin the new labeling process as soon as possible so that operators relying on this system have the necessary time needed to sell current inventory that doesn't include front-of-pack calorie labeling.

**3. BUSINESS INFO ON MACHINES:** Operators need to confirm that business information is included on vending machines or on adjacent signage. *This information must include:* business name, telephone number, and email or mailing address. The requirement is very specific in the FDA's final rule and the disclosure must include the above-listed information at a minimum.

**4. GUM, MINTS AND ROLL CANDY:** NAMA is working with the food and beverage manufacturing and operator

communities to create appropriate signage for gum, mints and roll candy disclosure. Stay tuned for an easy calorie disclosure solution for these products in the very near future that will ensure compliance and protect these lines of products in the channel.

**5. FRONT-OF-PACK:** The FDA recently issued an update to the rule which provides that front-of-pack disclosure meets the rule as long as it is visible to the prospective purchaser at the point of purchase. Therefore, there is no minimum font size at this time. However, as stated earlier, it must be visible to the consumer at the point of purchase, without obstruction.

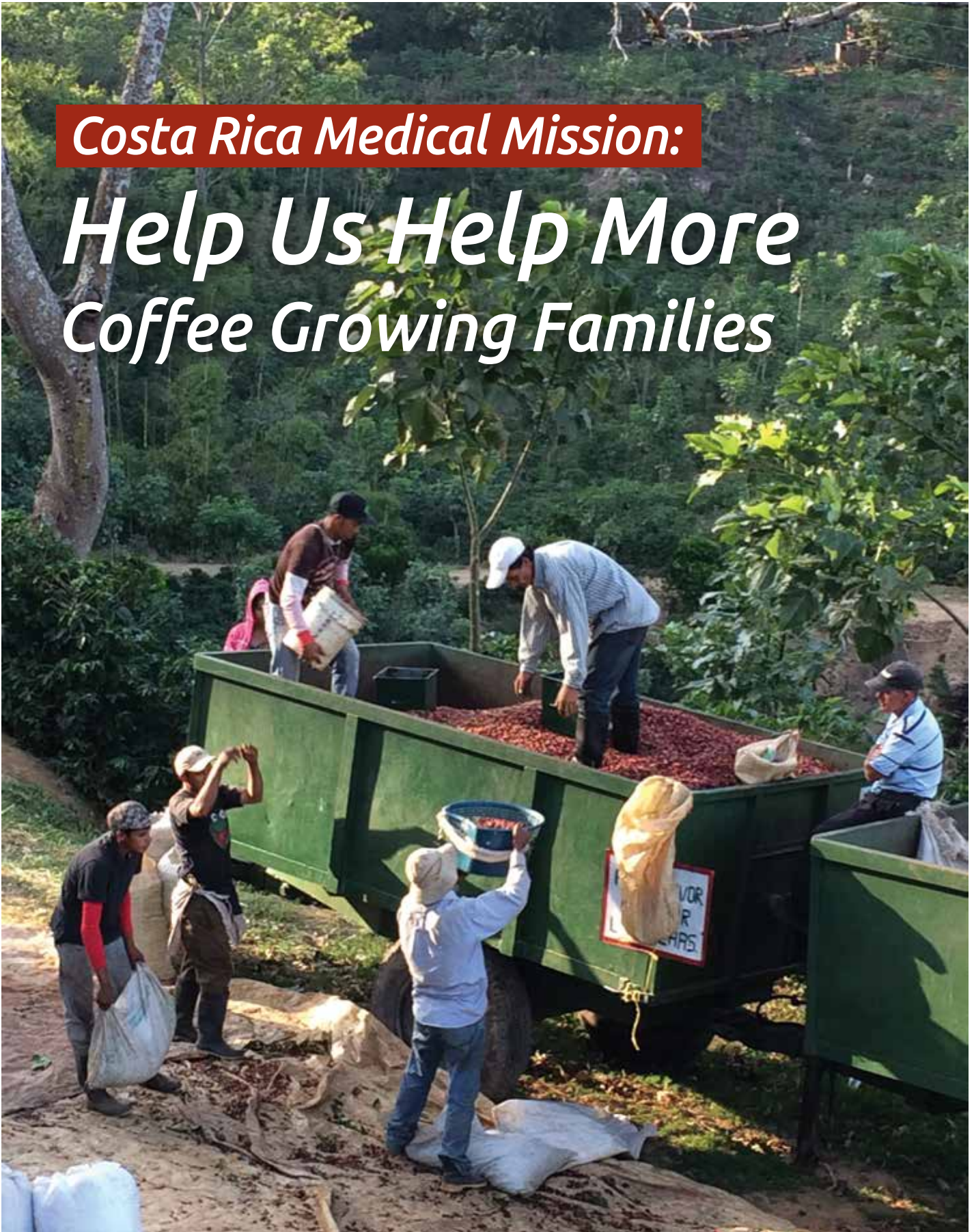
**6. COFFEE:** Vended coffee machines are included in the rule. Operators are urged to disclose calories on the front of the machine for coffee and additives dispensed from these machines as soon as possible.

**7. OCS EQUIPMENT:** The vending calorie disclosure rule does not apply to OCS coffee equipment.

**8. MICRO MARKETS:** The vending calorie disclosure rule does not apply to micro markets, unless they include a vending machine within the market. In that situation disclosure requirements would apply to that vending machine. ■

*Costa Rica Medical Mission:*

*Help Us Help More  
Coffee Growing Families*





I'm Dr. Cynthia Elliott, family nurse practitioner and primary care provider. I have been practicing medicine for 32 years and am

blessed to be able to use my gifts, abilities, and experience to help others in any way I can. I have a special place in my heart for the coffee picking community in Costa Rica.



In 2013, my husband Todd, of Tomdra, Inc., and I took a trip to with NAMA to Costa Rica to learn about coffee at the Santa Elena coffee farm. The owner, Luz Marina Trujillo, took an entire day to educate us about coffee and gave us a tour through the fields and coffee processing plant. In addition to learning about coffee, I learned that most of the pickers and their families were migrant workers from Panama and Nicaragua, who live somewhat primitively and have no access to health care.

When I returned home to Tucson, I communicated with Luzma and put together the initial medical trip, which took place in January 2014. What started in 2014 with caring for 200 people in four days grew to an annual trip—in 2016 we cared for 300 people! In total, we've helped about 850 people in this community thus far. Our next trip is

scheduled for January 2017, and we are very much looking forward to it.

The money we raise for this trip will be used for medical supplies, medications, equipment and volunteer ground transport to and from the fields. We have been able to supply antibiotics for many different types of infections, birth control shots for many of the women who have asked for this option, materials for minor surgeries, dental extractions, medications for breathing treatments, joint pain, and much more.

This trip provides the opportunity for all of us in the coffee service industry to give back to this community, whose members work very hard, painstakingly hand-picking coffee beans with great care. It is truly an honor and blessing to be able to visit Costa Rica and provide care for this

group as they work in the fields, and I am excited for our 2017 experience.

If you are interested in learning more or supporting our 2017 medical trip, donations are welcome! Funds will be used to purchase medication and equipment to make a difference in the lives of the coffee farmers we care for. ■

**TO DONATE**  
**(Requested by December 28)**

[Go to https://alive.infellowship.com/onlinegiving/givenow/noaccount](https://alive.infellowship.com/onlinegiving/givenow/noaccount)

- 1. In the first dropdown box, select "Missions"**
- 2. In the second dropdown box, select "Costa Rica"**
- 3. Choose your donation amount and complete the form with your credit card**

# THE DEPARTMENT OF LABOR'S FINAL RULE ON INCREASING WHITE COLLAR SALARIES RECAPPED

By Heather A. Bailey, Esq. at SmithAmundsen LLC, NAMA Knowledge Source Professional

**O**n July 27, 2016, NAMA, through its Knowledge Source Partner, presented a webinar on the U.S. Department of Labor's (DOL) final rule increasing the minimum salary requirements under the Fair Labor Standards Act (FLSA) for the "white collar" exemptions. Members have had many great follow up questions on how to pay their employees properly based upon this new rule.

## Here is a summary of the main highlights of the new rule:

- This new rule applies only to your Executive, Professional and Administrative classifications.
- The new salary minimum for these classifications is now \$913 per week (\$47,476 annually) as of December 1, 2016.
- Operators can use nondiscretionary bonuses and incentive payments (including commissions) to satisfy up to 10% of this new standard salary level so long as it's paid quarterly. This means an operator can pay \$822/week (instead of the \$913/week) on a salary basis and then pay at least \$91/week or at least \$1,092 per quarter in nondiscretionary bonuses/incentive payments. You are allowed to make a catch-up payment in the first pay period following the quarter if the employee does not receive the incentive bonus/commission. If you do not, the EXEMPTION IS LOST and overtime is owed for the prior quarter and going forward.
- PLEASE NOTE: Route drivers are NOT included in this minimum salary. Update yourself on the Motor Carrier Exemption ("MCE") requirements for route drivers (e.g., 10,001+ lbs. GVWR trucks, out of state goods not coming to rest at your warehouse, your state law provides for the MCE, etc.). If the MCE is applicable, your route drivers must get paid at least minimum wage for your locale, not the \$913 per week.
- If your route driver is not covered under the MCE (i.e., the truck is less than 10,001 lbs. GVWR, driver only transports dismantled commissary goods, state law does not provide for it, etc.), you must pay the driver overtime and do so based upon the full compensation for the week. For example, if the driver is paid a weekly amount plus commission, the commissions needed to be added into the weekly amount and then determine the overtime pay. Explore with your counsel alternative ways of paying overtime for employees who are not exempt from overtime.
- Now is a good time to analyze your exempt positions to confirm they meet the duties test and are truly exempt positions. For example, is your

route driver manager truly a manager or is he/she a lead driver with his/her own route and sometimes oversees the other drivers? Or is this manager hiring, firing and disciplining 2 or more drivers? Is your payroll clerk clearly just doing data entry and not exercising independent discretion and judgment? Now is the time to change those positions to hourly.

- For non-exempt positions (i.e., hourly), tighten up time clock or time sheet policies and practices, including how you compensate for certain travel time situations.
- Are you training your management to enforce certain policies related to

working time, time clock procedures, meal and rest breaks, working off the clock issues, etc.?

- Give your employees a complaint mechanism if they feel they are not being paid properly, have deductions made improperly, or are being required to work off the clock.
- Are you equipped to communicate any such changes in compensation to your employees while keeping morale upbeat and not losing any momentum?
- In the end, work with your counsel on determining the best practices for your business.

Do you want more guidance but you could not attend the webinar? Email [education@namanow.org](mailto:education@namanow.org) for a copy. ■



*Heather A. Bailey, Esq., a partner with SmithAmundsen LLC and a NAMA Knowledge Source Partner for over a decade, focuses her practice on labor and employment law issues for employers. Did you know that all NAMA members receive 15-minutes of*

*complimentary human resource consultations each quarter? Heather may be contacted directly at: Direct Dial: 312.894.3266, Email: [hbailey@salawus.com](mailto:hbailey@salawus.com). Join her firm's FREE labor and employment blog at: [www.laborandemploymentlawupdate.com](http://www.laborandemploymentlawupdate.com) for the latest updates on issues affecting your vending business.*

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### "Sometimes Supervisors":

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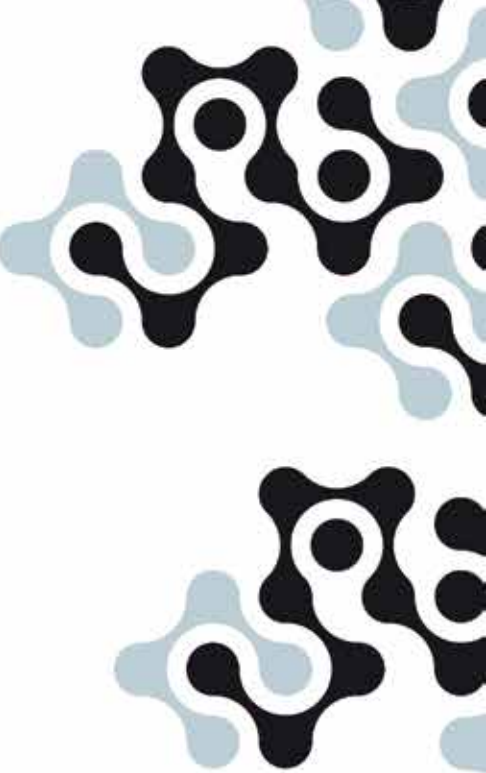
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HARRY RUSSELL



MARK RUSSELL

BILL RUSSELL



TIM RUSSELL



JACK RUSSELL

# Three Generations

## OF SERVICE TO THE INDUSTRY

For 80 years, the Russell family has been active in the convenience services industry with their family-operated Canteen franchise, Canteen Service of Steel Valley, Inc. The Russells, including Mark, his father, Bill, and grandfather, Harry, have worked in the family business in Ohio and have all served as state council and advisory board leaders and advocates for the industry.

### FIRST GENERATION

Harry Russell began his career in 1936 as a route man for the Canteen Franchise in Erie, Pa. In 1955 he had the opportunity to become a partner in the Youngstown, Ohio Canteen Franchise and continued there as president until his retirement in 1978. He was a charter member of the Ohio

Automatic Merchandising Association (OAMA) board (1959) and served as its president in 1970. OAMA played a major role in working with the Ohio Department of Health in developing early health regulations for the industry – leading the way for similar regulations across the country.

### SECOND GENERATION

William “Bill” Russell, a longtime member of the OAMA board, served as its president from 1982-1983 and was the industry’s representative on the Ohio Foodservice Advisory Board for several years. In 1984, he was honored with the OAMA Vendor of the Year award and in 1993, NAMA recognized him with the Arthur Nolan Award for outstanding service to the industry for his work in public health in the state of Ohio. Bill’s

brother Jack was also part of the family’s second generation in the industry, serving as his business partner for some 30 years prior to Jack’s retirement.

### THIRD GENERATION

Mark Russell, Vice President of Operations, has served on the OAMA board since 2008 and was elected as its president in June 2016. Under his leadership, health regulations remain an important part of OAMA’s legislative efforts with the advent of micro markets. The goal of OAMA continues to be the protection of the industry from unfair and potentially damaging legislation. Mark’s brother, Tim, also represents the third generation of Russells in convenience services as Vice President of Sales for the company. ■



# NAMA

## Tech News Roundup

### **NEC Begins Test of Biometric Payment System**

*Vending Times (07/22/16)*  
Schlesinger, Hank

NEC Corp. is testing a facial-recognition payment system at small shops in the company's corporate headquarters in Tokyo. The trials are being conducted as part of NEC's initiative to apply its biometrics authentication technologies to a range of services. The tests could provide another step toward demonstrating the viability of the technology and its use in vending machines, ATMs, and other retail operations. "This trial will enable us to improve technological performance and to accumulate knowledge towards the commercialization of facial authentication-based payment services, thereby helping NEC to enhance FinTech services and ensure greater safety and security," says NEC's Fumiaki Matsubara. The payment service being tested uses the company's NeoFace facial-recognition technologies that incorporate NEC's own facial-recognition algorithm. The system verifies identity by matching pre-registered facial images against images taken by a camera installed near a point-of-sale terminal. During the test, NEC will analyze authentication performance and operational workload under a wide range of conditions, which vary by types of cameras in use, installation position, lighting, balance between security and convenience, and other real-world factors.

### **Dr. K Tech Times: Product Recognition Software**

*Dr. K's Tech Times (08/16)*  
Kasavana, Michael L.

For many years, operators have struggled to find a more exacting method to coordinate products sold through a vending machine with sales and nutrition data. Now, as mandatory calorie disclosure requirements become reality, the ability to identify a specific product and link it to its price and caloric data take on a more prominent role in consumer-facing. Since item placement in a vendor tends to be based on a pre-determined planogram (POG) or product map, both of which rely on products being properly placed in the machine in adherence to the scheme, product recognition is assumed, not assured. To date there has been no easy way to prove that product placements were completed as planned thereby complicating nutritional, marketing, rebate programming, and/or sales analyses. The forthcoming development and advancement of product recognition software represents a tremendous move forward in the process of associating product data to specific items offered for sale, at the point of purchase. Making calorie information available is intended to help consumers make more informed choices prior to a product purchase. Given that FDA legislation will soon be mandated for operators of twenty or more vending machines, it is important that disclosures be made in accordance with the rules.

### **Mobile Payments Has One Big Market Left to Tap: The Uninterested Payment Week (08/19/16)** Anderson, Steven

There have been a lot of new and exciting developments in mobile payments in recent years, yet for many consumers the idea of a mobile payment system does not make sense. These uninterested consumers are the last great market frontier left for mobile payment systems, according to a new Citi Cards survey. The survey found 59 percent of users were "very unlikely" to start using a mobile payment app. In addition, only 21 percent of Internet users planned to try mobile payments, which means there is much room for mobile payment companies to break into a new market by convincing consumers that mobile payments are worthwhile. However, projections suggest the market will triple in value this year due to more users and businesses willing to accept mobile payments. The best way to show consumers the value of mobile payments is with a great customer experience. Analysts say mobile payments can offer ease of use that beats the credit card, security to match cash, and a rewards program that no other payment method can offer.

### **Micro Markets Lift Vending Industry Revenue to \$20.9 Billion** *Automatic Merchandiser (07/16)* Vol. 58, No. 4, P. 22 Reformat, Emily

Micro markets helped boost vending revenues to a six-year high of \$20.9 billion in 2015. Moreover, the percentage of revenue associated with micro markets climbed to a record-setting 10.2 percent of the total, making it the highest revenue-producing service segment after vending machines. A record number of operators said micro markets were their primary positive revenue driver, yet less than half of operators offer micro markets. Factors favoring micro markets

include reduced consumer emphasis on convenience and more stress on product variety, while micro markets' inventory management systems make it easier to determine which products are most profitable. Other vending industry trends include diversification of sites served by operators, with manufacturing and offices still important, while military bases and non-business and industry sites such as restaurants, correctional facilities, hospitals, and schools are gaining prominence. Operators are coping with the higher costs of doing business by using vending management systems for more effective business management, while cashless vending has seen significant growth. Machines accepting cashless payments has hit 15 percent, and the number of cashless readers also rose because of contraction in the number of vending units, mainly due to micro market additions. Despite nearly 60 percent of operators still unwilling to set up micro markets, a substantially higher number seeing less revenue in 2015 did not offer micro markets compared to those who did.

**More Than 25 Percent of U.S. Smartphone Owners Use Payment Apps at Least Once a Month**  
*Cellular-News (07/04/16)*

The number of U.S. smartphone owners using payment apps at least once monthly tops 25 percent, according to a Parks Associates report. The study estimated although more than 3 million retailers collectively accept Apple Pay and Android Pay, consumers currently favor retailer-specific apps that can control all aspects of the in-store payment experience. "Current vendors of digital wallet solutions are promoting in-store payment as a major value proposition for consumer adoption, but retailers large enough to create their own solutions are currently winning most of the adoption,"

says Parks Associates' Harry Wang. "Retailers are hesitant to embrace other payment apps due to four main issues: high upgrade costs of point-of-sales payment terminals; payment apps acting as gatekeepers to their shoppers' data; shoppers' confusion with various mobile payment options; and slow checkout speeds using payment apps versus credit card swipes." Parks Associates found PayPal to be the most popular payment app, with an active global user base of 179 million. The study also found consumers mainly use payment apps to pay for food and beverages, clothes, and event tickets. Supporting payments in these three sectors would enable app developers to reach nearly 75 percent of U.S. payment app users.

**These 4 Food Trends Are Making Investors Hungry**  
*USA Today (06/28/16)*  
*Malcolm, Hadley*

Specialty food sales represent 14 percent of all retail sales and have been growing significantly in recent years. Last year, sales hit \$120.5 billion, up more than 21 percent since 2013, according to the Specialty Food Association. For example, jerky and other on-the-go meat snacks are experiencing a resurgence with upgraded marinating techniques, new forms such as bites and bars, and trendier flavors. In addition, more companies are starting to offer non-dairy milk products such as almond milk and cashew milk. As sales of Sales of dairy milk continue to fall, non-dairy milk sales grew 9 percent last year. Korean pickled cabbage, or kimchi, and other fermented foods such as pickles also are gaining in popularity as consumers search for probiotics to snack on. Finally, companies are using coffee beans to flavor other products, such as almond butter, granola, mints, and pastries. Meanwhile, ready-to-drink coffee is the fastest growing beverage category in the

U.S., according to Beverage Marketing, and increasingly it's being served cold instead of hot.

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**Dr. K Tech Times: Mini-Max Inventory Operations**  
*Dr. K's Tech Times (06/16)*  
*Kasavana, Michael L.*

Inventory cost control in the refreshment services industry has always been a focal point, but recently it has taken on an even more prominent role as escalating energy costs, fleet transport, product costs, and delivery congestion have begun impacting operations. What is the best way to ensure an optimal mix of products in the warehouse without over-committing capital to stagnant assets? Well, often it is moving from a par stock based inventory control system to a minimum-maximum algorithm accomplished through back office software. Effective inventory control procedures can lower the cost of goods sold (COGS) while also enhancing efficiencies in product receiving, monitoring, replenishment, and auditing functions. Sound inventory policies can help identify shrinkage, automate purchasing, retain historical data, and present automatic reordering of depleted products. Maintaining stable inventory prices assists management with determining feasible selling prices while generating effective item contribution margins. In addition, inventory reports can be customized to address many important operational concerns, including the optimization of stock on-hand inventory based on supplier lead and lag times. Since refreshment service items tend to be purchased in case lots (purchase unit), stored in smaller breakout units (stock unit), and pre-picked by individual serving (issue unit), product tracking from receipt to delivery to dispensing can become quite complex. ■



## Stephanie Kull

Director, Communications & Media Relations  
Vendors Exchange International, Inc.



- B.S. in Human Communication, Minor in Business  
Arizona State University
- ELN Steering Committee, Social Media Liaison

### How did you begin your career?

I started my professional career directly following college as a candidate in the leadership development program for TTI, Group NA, working with brands like Milwaukee, Ryobi, Rigid and Homelite power tool products.

### What are the skills you use most in your career?

Throughout my career I have utilized my interpersonal skills in communication with the press, sales and negotiations. You are your own brand, and continually honing in on what makes you unique will help you grow professionally.

### How did you get into the convenience services industry?

I previously worked with Matt Shene, our President, who called me about an opportunity in the vending space. The rest is history.

### Give us an overview of your role and key responsibilities.

As the Director of Communications & Media Relations, it is our team's responsibility to understand the vending market, trends, and key products/promotions that will serve the vending industry well. I ensure our brand is communicated with consistency, both internally and externally; through media, tradeshows and ecommerce.

### What does an average day for you involve?

Each day is different, which is one of the things I like most about my job. From planning to execution, our team works on different projects, promotions and tradeshows throughout the year.

### What do you believe are the biggest challenges you face in your business?

It is always a balance to keep up with the latest technology advancements while staying focused on the core of our business.

### What are the greatest opportunities?

The greatest opportunities are working with other manufacturers in the vending space and bundling solutions to create value for our customers, bringing the same advancements in innovative technologies for a fraction of the price.

### Moving forward, what are your personal/professional goals?

For Vendors Exchange, I look to see our business grow. Personally, I would like to be recognized as a well-rounded business professional, understanding the multifaceted layers of business and how each are impactful to the business as a whole.

### Tell us about the most memorable work experience you've had.

My most memorable work experience has probably been when we got nominated for

the ALS Ice Bucket Challenge. It is near and dear to the Garsons (VE Owners), because their mother passed away from the disease. I staged three members of VE on top of vending machines, pouring water all over our owners and president. Our employees sure enjoyed the scene, too!

### What advice would you offer young people starting their careers in this industry?

I would say learn as much as you can. It has helped me tremendously to go on route rides with our customers, or work alongside our parts department. I am able to learn first-hand what troubles our industry has and help provide solutions.

### As an ELN Steering Committee member, in your own words, what is the value of participating in group?

It is my first year on the ELN Steering Committee, I am looking forward to networking with like-minded individuals who are looking to advance their careers and learn more about making an impact on the vending industry.

### What are you looking forward to at CTW 2016?

I am looking forward to enhancing the connections with the ELN Committee and NAMA Members through education and networking events. For Vendors Exchange, I am excited to show off our new coffee machines and talk to customers about how they can work well in their businesses. ■

# Welcoming the 2016-2017 ELN Steering Committee

“Established in 2014, the ELN Steering Committee creates an important leadership pipeline. Committee members add measurable value to the organization and to the industry overall,” said Roni Moore, NAMA’s Vice President of Marketing and Public Relations.

“Congratulations to Elyssa Allahyar-Steiner, along with her predecessors, Mike Kelley and Paul Tullio, each of whom laid the foundation for ELN’s success. Now entering its third year, the Steering Committee continues to grow ELN’s membership and to enhance NAMA’s advocacy and education initiatives,” she continued.

“We look forward to seeing what the ELN, under the leadership of the Steering Committee, will accomplish in the coming year,” she concluded.



**Chair:**  
Elyssa Allahyar-Steiner  
*Avanti Markets*



**Vice Chair:**  
C.J. Recher  
*Five Star Food Service*



**Government Affairs Liaison:**  
Mike Kelley  
*Burdette Beckman, Inc.*



**Social Media Liaison:**  
Stephanie Kull  
*Vendors Exchange International*



**Coffee Service Liaison:**  
Jon Snyder  
*Snyder Food Services, Inc.*



**Government Affairs Liaison:**  
Bradlee Whitson  
*K&R Vending Services*



**Social Media Liaison:**  
Juan Jorquera  
*Vagabond Vending*



**Education/Certification Liaison:**  
Danielle Lee  
*Custom Data Solutions*



**Public Relations Liaison:**  
Amanda Sulc  
*Accent Food Services*



**Trade Show Advisory Liaison:**  
Amber Starr  
*G&J Marketing and Sales*



**Foundation/Sponsorship Liaison:**  
Chris Hart  
*Southern Refreshment Services*



**Research/Information Liaison:**  
Paul Tullio  
*Gourmet Coffee Service*



**Trade Show Advisory Liaison:**  
Ashilyn Sunderman  
*Smith Vending Corp./Canteen*

WIN (Women of the Industry) was founded in January 2010 by Janette Carter, Heidi Chico, Shivani Gupta, Angela Olson, Barbara Russell and Carla Variglotti. Today, the six of them make up the WIN Advisory Committee alongside Pam Gilbert, the NAMA liaison. The vision, when the group first started, was to create an atmosphere for women to connect throughout the industry. A place to allow professionals to meet, share ideas and develop professional relationships. Our goals today for WIN members include:

- **Goal 1: Increase the number of women in NAMA and the convenience services industry**
- **Goal 2: Connect women in the convenience services industry with one another, so they may establish professional relationships, grow and develop skills to further their work**
- **Goal 3: Enhance wellness efforts within the industry**
- **Goal 4: Expand efforts to celebrate and recognize women**
- **Goal 5: Provide women with opportunities to continue their education and develop new skills**

## During our journey WIN has been part of many NAMA efforts:



### 50 People in 2010!

First event hosted 50 people at the OneShow in 2010.



### Women Leaders

WIN members promote ethics, communication, empowerment, education, wellness, innovation, learning and mentorship.



### Donations

In 2015 at the CTW Show kicked off its first annual 5K event, donating \$2,500 towards the NAMA Foundation



### Over 300 Members Today!

- In 2016, WIN has supported the following:
- o FunRun
  - o SDP Scholarship
  - o The Costa Rican Women's Health Program
  - o NAMA Foundation
  - o NAMA Fly-In



**THANK YOU TO OUR SPONSORS!**

**Looking to Join?**

Please contact [win@namanow.org](mailto:win@namanow.org)

**We look forward to seeing you at the second Annual 5K at the CTW Show in November.**

ARTICLE BY CARLA VARILOTTI



# WIN in Action







## Lisa Welch

President – CBI Associates, Inc.

- B.S. in Home Economics – Major in Interior Design, Minor in Business, Stephen F. Austin State University
- WIN Member
- Texas Merchandise Vending Association (TMVA)

### How did you begin your career?

After graduating college in 1987 with an interior design degree, I went straight to work for Caldwell Brokerage. My father, Jackie Caldwell, started Caldwell Brokerage in 1980. I have never looked back, only forward!

### What are the skills you use most in your career?

I work well with customers, developing relationships between vendors, distributors and manufacturers. I am very good at follow up, a very tenacious individual, and very attentive to details.

### How did you get into the convenience services industry?

Growing up, my father always worked for major food brokers. Besides being a food broker, our family owned a small grocery store. My first job in high school was with a supermarket checking groceries. Going to work for my father was just the obvious answer for me. My father always said, "If I would have known you wanted to be in the brokerage business, I wouldn't have spent all that money on college!"

### Give us an overview of your role and key responsibilities.

I have a wide spectrum of responsibilities. Besides overseeing CBI Associates/Caldwell Brokerage and the expansion of my territory in the last year, I am also the National Sales Manager for Wolfgang Puck Coffee. I oversee all sales within the U.S. With my drive and determination, nothing gets in my way!

### What does an average day for you involve?

Every morning I wake up and have 2-3 cups of Wolfgang Puck Coffee! I always touch base with my husband whether I am at home, on a flight or in a hotel. He is part of our company and my glue that keeps me together. I then check in with my office manager, Lisa Walker. Between the two of us, we rarely miss a thing. Lastly, I check in with Chris Taffera, operations manager at Wolfgang Puck. I am barely in my office, for my love is the "sale."

### What are the biggest challenges you face in your business?

I think keeping myself educated on what's new in the market and the relevance it plays in all aspects of this ever-changing vending and coffee services market. I am very committed to my work and those that I work with. I love seeing all the components come together no matter how long it takes.

### What are the greatest opportunities?

As a small business brokerage, I am able to grow geographically. Therefore, I am able to compete with the major competitors. Also, I believe the lifelong true friendships you make in our business always open other doors.

### Moving forward, what are your personal/professional goals?

My primary focus is to continue to grow my business and build upon its success. I want to grow as an individual in the vending and coffee services world and to secure the relationships that I have made. I want to take care of those people that have taken care of me.

### Tell us about the most memorable work experience you've had.

There have been two people that have influenced my work that I will forever be grateful to. First and foremost, my father, Jackie Caldwell. He taught me right out of the gate how to not only make money to pay my salary but to make extra for the "house" and to always take care of your customers and the employees that have helped in my success. He has been my teacher and my strength when needed. The other person is Don Stoullil. He hired me seven years ago for my position at Wolfgang Puck. He saw my potential and took the time to train me for that first year in OCS. Working with Wolfgang Puck has opened so many doors. I am grateful to continue my dad's legacy.

### What advice would you offer young people starting their careers in this industry?

It takes HARD WORK, DETERMINATION AND NO SHORT CUTS.

### As a WIN member, in your own words, what is the value of participating in the group?

Participating in WIN allows the opportunities to share daily and professional experiences with other women. It also allows me to discuss the challenges we face as women.

### What are you looking forward to at CTW 2016?

I am very enthusiastic about seeing pods gain traction in the single cup market. With pods and bean-to-cup prevailing out in the single cup market, I look forward to the introduction of new equipment that will become available. ■

# Thank You, Investors

The NAMA Foundation is tremendously grateful for all of its supporters who have remained committed partners as we work together to build a sustainable future.

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