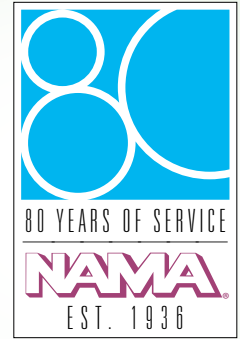


SPRING 2016

InTouch

THE OFFICIAL MAGAZINE OF NAMA



**EXECUTIVE
FORUM 2016**
powered by NAMA



**OneShow
Preview**



A **closer** LOOK

NAMA CEO • **Carla Balakgie**

A VIVID VISION Takes Shape in San Jose

NAMA's 80th year is an ideal opportunity to contemplate the industry's forward focus: Where can we boldly go? How can we get there faster? **What is our 'vivid vision' – our blueprint for growth – for the years ahead?**

These are the kinds of big questions that drove discussions at NAMA's inaugural Executive Forum in February.

The 2½ day event in San Jose—the heart of innovation—was designed to engage and challenge the industry's most senior and accomplished leaders around three key themes: consumer markets, innovation and corporate culture. It was intended to inspire bold thinking, fresh ideas and unexpected relationships and to move participants and their companies to a new level of success.

For me, NAMA's Executive Forum was personal. In fact, it was a fulfillment of a pledge we made to deliver distinctive thought leadership for the industry that will disrupt the "business as usual" mindset. The event was also part of our commitment to Positioning for Growth capital campaign contributors, and it was important to deliver on that promise in a big way.

The reviews we've seen from participants have been gratifying. One attendee said the Executive Forum was unlike any NAMA

event before, adding, "it was looking at our industry from the outside in." That statement encapsulates the very DNA of the event—to see the industry in a whole new way.

Participants engaged in dynamic discussions and took an insider's look at world-class companies: Google, Intel, Salesforce and Visa. They heard from provocative speakers like Starbucks' Howard Behar, Forbes' Richard Karlgaard, GeekSquad's Robert Stephens and growth guru Cameron Herold. (Herold, who coined the term "vivid vision," is featured in this issue, with each speaker to be profiled in subsequent InTouch editions.) NAMA took attendees to a place, a space and a learning experience that moved the needle. Our objective was to move past existing aspirations, and to change them.

What we were not trying to do in Silicon Valley is problem solve. Our intention was not to send attendees home with a tool or a solution or a manual for their current reality. Rather, our purpose was to inspire them to dream... to dream about what could be and what should be.

The theme of the Executive Forum was **Dream. Build. Win.** In February in San Jose, we delivered nearly 100 industry executives with a golden opportunity to dream. Converting dreams to reality is not a linear process; we are trusting that

the implicit knowledge gained will provide the foundation for turning ideas into actions. The next step, to build, is a personal responsibility—to put into motion the possibilities envisioned. And to win... well that, too, is up to Forum participants...and also to you.

One of our board members called the Executive Forum “a physical manifestation of NAMA’s rebranding.” I completely agree. Now we need to build on the spark ignited in San Jose — to inspire a vivid vision for all of NAMA’s members.

At times of celebration like our association’s 80th anniversary, it is customary to consider the notion of legacy. NAMA’s Executive Forum is the initiative of which I am personally most proud — and a legacy I hope will pay dividends for years to come. To those who were there, thank you for your

energy and engagement. To those who were not, plan join us the next time. It really is a transformative, don’t-miss event.

More immediately, we look forward to seeing you at the OneShow, where you will be introduced to our new brand—our new NAMA. We can’t wait to dream, build, and win, together!! ■

Carla Balakgie is President and CEO of NAMA. Prior to joining the association in 2011, Balakgie served as CEO of the Electronic Transactions Association and Senior Vice President and COO of the National Association of College and University Business Officers. She began her career in association management at the American Society of Association Executives. A Certified Association Executive and a Fellow of the American Society of Association Executives, Balakgie is the first woman to lead NAMA in its 80-year history.

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CHEERS TO 80 YEARS

DAN MATHEWS, JR., NAMA EXECUTIVE VICE PRESIDENT & CHIEF OPERATING OFFICER

This year brings with it a significant milestone for NAMA. 2016 marks our 80th anniversary, and 80 years of serving you, our loyal members.

In reflecting on a rewarding “year of firsts”— including our first FlyIn, record attendance at OneShow and CTW, major endorsements of our FitPick nutrition program and the launch of our inaugural Executive Forum – it’s important to look at how far our industry has come since the association was founded in 1936.

In our 80 years of service, NAMA has been led by only six CEO’s – a record of stability worth noting. Our current President and CEO, Carla Balakgie took the helm in 2011, making history as the first female leader of our industry.

NAMA was established on September 14, 1936, by 13 industry leaders and a pledge of \$5,000 to start the organization. Their goal of helping grow the vending industry was threatened by discriminatory taxes on vending machines. And so NAMA began with a central purpose of advocacy, and it remains a pillar of the association today.

In the years since, we’ve grown in size and scope, to support members in all 50 states and a \$25 billion industry that is evolving and innovating every single day. Education, networking and information joined advocacy as key pillars of NAMA, and all continue to underscore the events, programming and services we provide to members today.

What started as industry of simple single-product machines, has expanded to encompass dynamic channels including coffee service and micro markets, an incredible variety of products, and an impressive array of industry technology.

Our industry has played an important role in the lives of Americans over the last 80 years, delivering snacks, beverages and more to millions of people each day. It’s exciting to think of what we will achieve together over the next 80 years – the possibilities are endless.

As of this writing, we have just returned from our first-ever Executive Forum in Silicon Valley – the heart of modern innovation. The industry’s most accomplished professionals gathered to focus on the future of refreshment

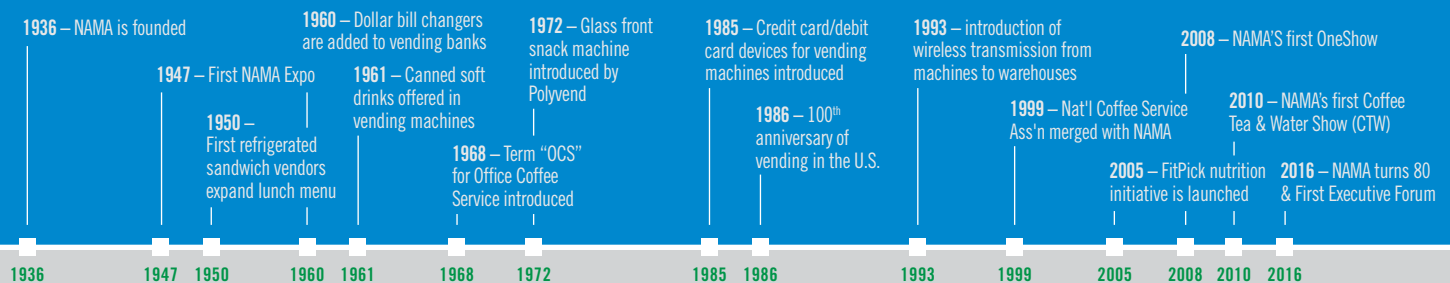
services through three lenses – consumer markets, innovation and corporate culture. The message loud and clear from keynote speakers and site experiences alike was that for our industry to grow and thrive in the future, businesses need to consider these three factors and be ready to adapt, disrupt, support exceptional talent and most importantly, listen to their customers.

Participants told us they found the event to be thought-provoking, inspiring and a game-changing experience. An experience we hope will help them tackle challenges and create new strategies for future success with their businesses. The Forum is just one example of our commitment to helping drive the industry forward – there are many more exciting things to come as we enter this next decade of service to you.

As always, NAMA continues to work on behalf of our members to foster profitable growth of the industry.

We can’t wait to see what the next 80 years will bring. ■

NAMA THROUGH THE YEARS





80 Years of Pushing the Envelope



In reflecting on our 80th anniversary this year, I realize that NAMA has been around longer than most of us have been alive. Think about that.

Think about NAMA's founders — business owners just like us — coming together in 1936 to create an organization to effect change, to collectively grow the industry, to disrupt “business as usual.”

We all belong to NAMA for those very same reasons today. Of course, the rate of change is accelerating at a much faster pace in 2016. But we can learn a lot from those early visionaries who paved the way in our industry.

Embrace New Ideas

The future of the refreshment services industry is unbounded in terms of products and delivery systems. What new offerings should you be considering?

Your answer may be that what you have now is working well and that your customers are happy. But sometimes our assumptions are wrong.

Let's look at healthier vending. A few years ago, we all agreed that it made business sense to provide healthier products since the public was clamoring for them. So we began

introducing them in vending machines and micro markets, but sales didn't meet expectations. Why?

It wasn't that consumers didn't want healthier options, they just didn't like the specific products being offered. The products didn't taste good. So suppliers improved on that and now sales are booming.

Listen to the Market

My point is this: We must listen when the consumer speaks. And we must be so in tune with evolving needs that we can anticipate them.

So what's on the horizon? The line between vending and micro markets is fading. We're essentially now all retailers, and we need to customize and personalize the experiences we provide.

For example, in coffee — my arena — there's a strong focus on “handcrafted authenticity.” To be competitive, you must be an expert, understand the botany of coffee, travel to coffee-producing countries, know your farmer. Sustainability and fair trade are almost passé — if you can't, with any degree of passion, describe a coffee farming family, you don't have the perspective needed to win today.

Look to NAMA

I've had lots of conversations with operators recently, and they all agree that you need to be in the game to win. That means engaging with the industry at NAMA events, where the best thinking happens and where deals get done.

CTW this past November is the perfect example. Investors were there, evaluating emerging brands and networking with key industry players. Just a few weeks later, those same investors inked a \$14 billion deal purchasing a majority stake in Caribou, Mighty Leaf, Intelligentsia and Stumptown.

Our industry is catching fire because the world wants convenience now more than ever, and we've delivered convenience for 80 years.

At the OneShow in April, we'll pay tribute to this legacy by unveiling a dynamic new NAMA brand — one that honors our rich past and looks forward to the promise of the future. We've also planned an exciting, interactive general session featuring the stars of ABC-TV's hit show *Shark Tank*.

So come to Chicago and swim with the sharks! The water's fine. ■



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ONE
SHOW

Welcome to the Windy City!

NAMA OneShow returns to Chicago this year with a host of exciting things in store, including an unprecedented general session, the unveiling of a new NAMA brand and the celebration of the association's 80th anniversary.

An event like no other, OneShow delivers unparalleled education, networking and business-building opportunities with unrivaled access to thousands of products, services and new ideas. More than 4,500 refreshment services operators and suppliers will convene at McCormick Place from April 13-15 for the industry's premier event.



Swim With Sharks

Stars of ABC-TV's hit show *Shark Tank*, Lori Greiner and Robert Herjavec, will headline OneShow 2016, redefining the general session experience.

Teams of hopeful innovators will compete in NAMA's Swim with the

Sharks, pitching their industry-related ideas to the sharks—titans of industry who made their own dreams a reality and turned them into lucrative empires. Contestants must convince Greiner and Herjavec to award them the NAMA prize money.

"Bar none - this is the most innovative general session we've had at One Show," said Carla Balakgie, NAMA President and CEO.

"Furthering the momentum of NAMA's inaugural Executive Forum, and in line with the new NAMA brand—set to be revealed during this session—our very own Swim with the Sharks delivers an exclusive look at what it takes to transform an idea into a successful business. Disruptive thinking, cutting-edge concepts and an entrepreneurial spirit will converge on stage, providing attendees with a truly dynamic experience we hope inspires One Show attendees to elevate their businesses to the next level," she continued.

The opening general session will also feature remarks by Balakgie and NAMA Chair Howard Chapman, as

they unveil the new NAMA brand, pay tribute to 80 years of service and present the 2016 Industry Awards.

Show Floor and Education

The expansive show floor featuring 260-plus exhibitors will showcase the latest industry innovations and technology, helping attendees identify new products to grow their businesses and enhance their competitive edge.

In addition to a robust exhibit hall, OneShow offers 40-plus hours of education and networking, providing attendees with information directly applicable to their businesses and valuable peer-to-peer relationship-building. Industry experts and high-impact speakers will share insights on emerging trends, innovation, the customer experience and streamlining operations to help businesses achieve greater success.

OneShow is the **one place** industry members — including vending, coffee service and micro market professionals — gather to focus on advancing industry innovation and build a powerful network of industry allies to help grow their businesses. ■

Preview & Schedule

Tuesday, April 12th – 2016

▶ 7:00 am - 5:30 pm – Registration Open

▶ 8:00 am - 12:00 pm

- *Coffee 101: The Elements of Coffee (Advanced Pre-paid Session) \$395 members/ \$545 non-member)*
Mike Tompkins, President, Coffee Products Associates

▶ 1:00 pm - 5:00 pm

- *Path to Profit: NAMA Pricing Seminar (Advanced Pre-Paid Session) \$395/person/ \$545 non-member cost*
Dr. Gil Harrell, Professor of Marketing, Michigan State University

▶ 6:00 pm - 7:30 pm

- *ELN/WIN Networking Reception*
Hard Rock Hotel, The Hamer Room
230 North Michigan Avenue
Join ELN and WIN in celebrating NAMA's 80th Anniversary with an evening of networking.

Wednesday, April 13th – 2016

▶ 7:00 am - 6:00 pm – Registration Open

▶ 8:30 am - 9:30 am – Education Sessions

- *Roadmap to Technology: Starting Out, Speeding Up, and Scalable Solutions*
Moderator: Dr. Michael Kasavana, NAMA Endowed Professor Emeritus
Panelists: Ryan Harrington, Royal Vending; Rod Nester, Smith Vending Corp; Bradlee Whitson, K&R Vending Services



Are you an independent operator with a small to medium number of routes looking to invest in technology to help manage and/or operate your business? Come hear how others got started, what they determined were feasible and logical first steps, and why they did or did not implement specific applications. This session is for both newbie and experienced operators interested in designing a technology roadmap to guide their decision making. Lower your anxiety and let the experience of others be your guide.

- *Critical Issues in 21st Century Vending*
Rick West, CEO, Field Agent; Chip Potter, VP Information Services and Communications, NAMA

- *Hot New Trends in Cold Coffee*
Speaker by Gavina

- *The Impact of Changing Consumer Food Values*
Brent Budke, Senior Consumer Insights Manager, General Mills

Join General Mills' Brett Budke as he explores how changing consumer food values are shaping the future of vending and micro markets. In this 60 minute session, Brett will share research and data showing the increasing interest in Natural and Organic snacks and better for you products, as well the impact of millennials and their purchasing patterns. Come to this session to find out which types of products you should offer to satisfy consumer demand.

▶ 9:45 am - 11:15 am – Education Sessions

- *Dr. K's What's Trending in Vending, Micro Markets & Refreshment Services*
Moderator: Dr. Michael Kasavana, NAMA Endowed Professor Emeritus
Panelists: Anant Agrawal, Cantaloupe Systems; Glenn Butler, Nayax; Brendan Kehoe, Crane/Streamware; Mike Lawlor, USA Technologies; Chris Lilly, Best Vendors/NAMA VDI Task Force; Paresh Patel, PayRange; Randy Smith, LightSpeed Automation

Gaining a competitive advantage in the marketplace almost always revolves around implementing an innovative, efficient and effective technology application. Learn what technologies are trending in industry channels and hear from thought leaders as they share their perspectives on emerging and relevant applications in the industry.

- *Let the Data Decide: Using Analytics to Gain a Competitive Edge*
Dr. Cheri Speier-Pero, Professor, Michigan State University

- *Small Operator Round Table*
Moderator: Chip Potter, NAMA

Preview & Schedule

▶ 11:30 am - 12:30 pm

- **Nutrition/Health/Wellness: Trends and Opportunities in 2016 and Beyond**
Bill Layden, Partner, Foodminds



Join Foodminds Partner Bill Layden for a broad-ranging, strategic discussion on nutrition, health and wellness trends and their impact on the industry. Following this high-value, dynamic presentation, there will be ample opportunity to interact and get your questions answered by this nationally-recognized expert.

- **Beacons: Signaling a New Era of Precise Operational & Marketing Capability**
Dan Cath Strategic Partnerships & Business Development Google
Derek Myers Channel Strategy & Commercialization The Coca-Cola Company
- **Ask the HR Pros: OSHA, Compliance, and More**
Heather Bailey, SmithAmundsen and Jon Hoag, SmithAmundsen
- **LinkedIn and Social Media Success**
John Healy, CEO, Healy Consulting & Communications



▶ 1:15 pm - 3:00 pm

- **Swim With The Sharks**
Honor your peers, glean critical industry insights and prepare yourself for the Sharks who are swimming in Chicago!

NAMA Chair Howard Chapman of Royal Cup, Inc., will kick things off as host of this year's Industry Awards. Join us as we honor the Operator of the Year, Allied Member of the Year and Industry Person of the Year. Following that, NAMA CEO Carla Balagie will deliver this year's industry address, delving into

the key issues and topics impacting all of us in the vending and refreshment services industry. You won't want to miss it when Carla reveals NAMA's new brand.

Then it's time for a Swim With The Sharks! Three lucky industry entrepreneurs will have the chance to convince Lori Greiner and Robert Herjavec of ABC's hit show Shark Tank, to award them prize money

▶ 3:00 pm - 6:00 pm - Show Floor open

Thursday, April 14th, 2016

▶ 7:00 am - 4:30 pm - Registration Open

▶ 8:00 am - 9:00 am

- **State Council Breakfast**
This event is by invitation only.

▶ 9:30 am - 11:00 am

- **NAMA Annual Meeting/ Best Practices for Health and Food Safety**
Moderator: Eric Dell, VP of Government Affairs, NAMA
Speakers: Angelo Bellomo, Deputy Director for Health Protection, City of Los Angeles, CA; Roger E. Coffman, LEHP, Food Program Specialist, Lake County Health Department, Lake County, IL



Join us for NAMA's Annual Meeting and a lively discussion on Health and Food Safety led by NAMA's Government Affairs Team. Health inspectors from across the country will discuss food safety and how to best protect your business and customers. This session will provide you with inside information on what inspectors are looking for and how to adhere to health and food safety regulations in the vending, micro market, OCS and foodservice channels.

▶ 3:00 pm - 6:00 pm - Show Floor open

Friday, April 15th - 2016

▶ 8:00 am - 12:30 pm - Registration Open

▶ 9:00 am - 1:00 pm - Show Floor open

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 Wilbur Curtis 738
 WMF Americas, Inc. 134
 Xyience Beverages Inc 113

FORUM FORWARD



Forward-thinking and designed to propel the industry toward sustainable future success, NAMA's inaugural Executive Forum debuted in San Jose, California February 17-19. Nearly 100 industry leaders convened in Silicon Valley to hear from prominent business leaders and provocateurs and get an exclusive peek behind the curtain during site experiences at some of today's most innovative companies, including Google, Intel, Salesforce and Visa.

business and consumer brand expert and consultant. NAMA CEO and President, Carla Balakgie and Executive Forum Task Force Chair, Vic Pemberton addressed attendees with opening remarks.

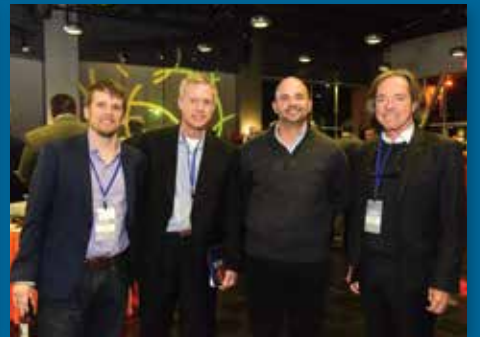
Energizing sessions focused on end-users and listening to customers, removing barriers for a frictionless experience and fostering a culture that attracts top talent. Attendees also took part in site visits at some of Silicon Valley's leading disruptors including Google, Intel, Salesforce and Visa, for an exclusive behind-the-scenes look at how they innovate on behalf of consumers, as well as the corporate culture they use to achieve greatness.



Focused on trends and opportunities in the areas of **CONSUMER MARKETS, INNOVATION,** and **CORPORATE CULTURE,** the Forum delivered unparalleled thought leadership from featured speakers: Howard Behar, former President of Starbucks Coffee; Cameron Herold, business expert and former COO of 1-800-GOTJUNK; Mark Jeffries, communications expert and author; Richard Karlgaard, Publisher of Forbes; Robert Stephens, founder of The Geek Squad; and Jerry S. Wilson,

Tackling some of today's most important business issues and promoting professional development, growth and essential networking connections, the Executive Forum inspired and empowered participants to give their companies a leading edge. ■





[FORUM 411]



Howard Chaimovitz @HChaimovitz · Feb 18
 #NAMAEP16 The NAMA Executive Forum invades Google headquarters! Thanks to all Google presenters.



Carla Balaskie, CAE @CarlaBalaskie · Feb 18
 We're moving from automation to anticipation. Robert Stephens #NAMAEP16 @NAMAvending

lance whorton @lancewhorton · Feb 18
 #NAMAEP16 Imagine...employer break rooms as the "new" \$8 sit down meal of the day and tipping not required

Lindsay Nelson, CAE @LINDSEYNELSON · Feb 17
 "Anyone who touches a human being in their business better be talking directly to the customer" #NAMAEP16

Megan Denhardt, CAE @meganrdhrt · Feb 18
 Don't coach your employees on things they are 'bad' at. Help guide them to the right coast. Focus on strengths - not weaknesses. #NAMAEP16

Carla Balaskie, CAE @CarlaBalaskie · Feb 18
 A prototype is worth a thousand PowerPoint presentations and grand plans. Robert Stephens @NAMAvending #Innovation #NAMAEP16

Josh Rosenberg @joshrosenberg · Feb 22
 TU #NAMA #NAMAEP16 #purpose #inspired #ready for the next phase of consumer focused convenient solutions and #transformation @CarlaBalaskie

Carla Balaskie, CAE @CarlaBalaskie · Feb 18
 Vision without execution is hallucination --T. Edison. @NAMAvending #NAMAEP16

Josh Rosenberg @joshrosenberg · Feb 19
 @salesforce @AccentFoods_TX #NAMAEP16 #stevia



ericdell @ericdell · Feb 18
 #namaep16 attendee quote - "If this doesn't excite you, you don't have a pulse" @NAMAvending

Megan Denhardt, CAE @meganrdhrt · Feb 17
 Be willing to fight for what you believe in. And also nourish a team that you trust. Surround yourself with the right people. #NAMAEP16

roni moore @ronimoore · Feb 18
 Thanks World. Inviting for deeper dive into "Frictionless Experiences" #NAMAEP16 #NENVending @USA_TECH

