

SUMMER 2018

# InTouch

*The Official Magazine of NAMA*



***The NAMA Show 2018: Innovation & Inspiration***



***Looking Ahead: The 2018 DC Fly-In***

***Behind the Lens:***

***This is Convenience Services***

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*Meet the New  
NAMA Knowledge Center*

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Take a behind-the-scenes look at our new video, *This is Convenience Services* on page 31!



See how our industry fuels the important moments in consumers' lives.



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## NAMA Foundation

# Your *Future*, Our *Focus*



### Education

Supports learning and leadership development opportunities for members including providing scholarships.



### Research

Funds research that enables industry businesses to expand growth and stay current in the changing market.

### What makes this work possible?

The generous support of operators, suppliers, distributors and individuals who believe in our collective power to grow the industry.





## California Dreamin'

Carla Balakgie, President & Chief Executive Officer of NAMA

In a recent Forbes story, writer Patrick Hanlon argues that “Whether it’s inventing radically new technologies, business models or pushing the envelope of human potential, *California Dreamin’* is not just a song. It seems to be an anthem based on thriving practice.”

At NAMA, we make it a point to get out into the field so we can experience our members’ businesses firsthand, just as you do when you’re studying your customers’ businesses and markets. Recently, this effort took us to northern California and the Pacific Northwest, the epicenter of innovation, where an imaginative culture has nurtured, sustained and operationalized raw ideas, turning many of them into billion-dollar businesses.

During our visit, we stopped at Starbucks, Peet’s Coffee, Associated Services, Avanti and Clif Bar & Co. What we observed did not so much surprise us, but rather it reinforced NAMA’s spadework in the areas of consumer empathy, customer service and the changing dynamics of the convenience services industry.

We’ve said that the consumer experience is really based on how your customers feel. One of the best ways to make customers feel better about the experience is to listen to them, understand their concerns and deliver empathetic and predictive service.

Listening to the customer is a time-tested, tried-and-true strategy.

Empathy takes listening to the customer a quantum step further. It’s about intuiting customers’ pain points and meeting their needs.



***“Empathy takes listening to the customer a quantum step further. It’s about intuiting customers’ pain points and meeting their needs.”***

As vending, micro markets and office coffee and pantry service converged and evolved into the convenience services industry, it was critical for NAMA member companies to think like retailers. This way of doing business – to think like a retailer and prioritize toward what clients and consumers want to purchase – is an opportunity, albeit one with a new sense of urgency.

The vast range of SKUs we saw at Associated Services revealed an impressive array of health-focused foods, curated to meet consumers’ very specific

tastes – chia seed bars, hazelnut butter pouches, and brussels sprout puffs, just for starters. In his book, *The Long Tail: Why the Future of Business is Selling Less of More*, Chris Anderson accurately forecast this business paradigm of retailing micro amounts of a multitude of products for driving up both customer satisfaction and profitable revenue.

Overall, managing the new dynamics of the convenience services industry is no easy task. And it requires a change in the way you do business. At Associated Services, we also observed that the operational innovation for the emerging pantry services business went well beyond product mix. Optimizing business functions involved transforming the role of the route driver, which compounded such responsibilities as inventory and cost management and CRM. Now, their company must satisfy customers’ specific product preferences, and provide high-touch, high-frequency service while actively supporting management of the client’s monthly spend.

Another thing was evident from this excursion—nutrition and wellness, long priorities of NAMA’s, are increasing in importance to consumers and to lawmakers at federal, state and local levels. This is imminently clear in the bellwether state of California, as state trends have the real potential to become national phenomenon. Case in point: California is the first state to

pass legislation mandating that 35% of products sold in vending machines must comply with nutrition standards. So a proactive move toward a diversified product mix, better aligning with both consumer preference and these kinds of seismic societal shifts, is a good business strategy for two reasons—capitalizing on increasing demand and heading off adverse governmental intervention. For its part, NAMA is redoubling its efforts in demonstrating that the conveniences services industry is a leader in *doing well by doing good*.

”

***“California is the first state to pass legislation mandating that 35% of products sold in vending machines must comply with nutrition standards.”***

These factors we saw during our visit to the Pacific Northwest are admittedly a microcosm of a sea change and one that will spread to us all. The scope and scale will vary, but it’s already here and now. I encourage you to embrace it and turn it to your advantage.

When you step into your customers’ shoes, you can see miles ahead. Have a conversation with your customers about what they’re trying to accomplish, what their business and employee satisfaction goals are, and how you can help. You’ll find a treasure trove of information to propel your own business forward. ■

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## Collaboration: Together We are Stronger

*Jeff Smith, NAMA Chair*

business. We've adapted to a changing environment, and that process continues. Collaboration – among my peers in Michigan and the industry nationwide – has been a key factor of successful adaptation. Collaboration has delivered support that's been significant in many ways. My take: together we are stronger and can achieve more.

Underscoring that point, NAMA chief executive Carla Balakgie sometimes uses the aphorism “a rising tide lifts all boats.” The “rising tide” principle, also attributed to John F. Kennedy, simply holds that improvements in the general economy benefit all participants. I believe, whole heartedly, that this is true.

One example of our industry working together – and the huge payoff collaboration can bring – is in the area of government affairs. Government affairs and advocacy are among NAMA's primary responsibilities, but it's a job that requires our personal participation to get it right and maximize the payoff.

During my time with the Michigan State Council, we worked closely with elected officials in Lansing. We met with state lawmakers to discuss taxation, regulation, coins and currency, among other issues affecting the industry. As we've continued to build relationships in the Legislature, we've been able to get more done. The payoff was clear and rewarding, particularly

when we fought and defeated a prospective 6% tax that targeted products sold through vending machines, but not levied on those same products sold at convenience stores. Because of collaboration between the Michigan State Council and NAMA, we fought, we won and we prevented the loss of millions of dollars for Michigan's operators.

As I became more involved at the national level at NAMA, I joined other first-timers at the association's D.C. Fly-In four years ago. I was part of a group that attended meetings throughout the U.S. Capitol. It was during that visit that I realized the potential impact of our work.

Flash forward to the Fly-In today: we now have hundreds of participants representing most regions of the country, all segments of the industry, and companies large and small. Our agenda is full, with a focus on key issues faced by the industry, including refrigerants and nutrition. Are you on the team at this year's Fly-In? I hope so.

According to consulting giant McKinsey, “The business value at stake from government and regulatory intervention is huge: about 30% of earnings for companies in most industries.”

This year, I'll work alongside you to propel our business forward, but our success will be greater and more meaningful if we work together. See you in D.C. ■

**A**s I begin my term as NAMA's Chair, I want to share my excitement and enthusiasm for the year ahead. I'm looking forward to strengthening the relationships I value with so many colleagues and to building new ones with other industry members. Networking with industry peers, after all, is a core value of NAMA membership, and it's something I value highly. For those of you whom I don't yet know, I'd like to share a small part of my story, as I hope to learn more about yours.

My family business is All Star Services, based in Port Huron, Michigan, established in 1963. Today, in addition to me and my wife, our children play a key role in the company's leadership. Together, we are focused on providing comprehensive on-premise food and beverage solutions for our clients – from office coffee and water services to vending machines, fresh foods and self-checkout markets.

As the convenience services industry continues to evolve, so too is All Star's





*The newly-branded NAMA Show returned to Las Vegas, bringing the industry together for a show delivering innovative new features, expanded educational programming and valuable business growth opportunities.*

"The industry came together in force for this year's dynamic NAMA Show, with more than 4,400 attendees and 313 exhibiting companies," said Lindsey Nelson, Vice President of Programs and Services. "With the highest exhibitor count to date, 84 exhibiting companies were first time-participants. Attendees came from around the world, representing





*"Fabulous business legends from around the country paired with first class educational sessions and trade show. I would recommend this conference to anyone in the business."*

— Jim McKenzie,  
G & J Marketing and Sales



41 countries. Industry decision-makers explored more than 80,000 square feet of show floor space and discovered more than 100 new products."

### NEW FEATURES

New features this year:

- **Convenience Central** – This member engagement space was the heartbeat of the show floor, serving as the primary location for attendees to network, conduct one-on-one meetings, engage with staff and participate in customized product demonstrations.
- **New Product Zone** – Featuring more than 100 new products, attendees scanned items of greatest interest and,

in real time, received a summary listing and show floor locations for those new products.

- **NAMA Cares** – Designed to deliver concierge-level services, NAMA launched a dedicated customer service hotline to address all attendee and exhibitor questions. This service was further enhanced onsite with the NAMA Cares service counter.
- **Captivation Station** – Situated in a geodesic dome on the trade show floor, this intimate and engaging space hosted 10 exhibitor presentations with an estimated 250 attendees. Customer engagement, connectivity, networking, and a session focused on increasing

sales, targeted specifically for small operators, were featured topics.

### GENERAL SESSION

Sponsored by PepsiCo, the General Session featured two keynote speakers, futurist Brian Solis and political analyst Matthew Dowd, in a dynamic, interactive format. Addressing leadership, innovation and the speed of change, Solis and Dowd delivered two unique, but interrelated segments immediately followed by a "power huddle" conversation led by Carla Balakgie.

The General Session also unveiled a dynamic new video, *This is Convenience Services*, designed to answer the question "how does the convenience services industry make



consumers' lives better?" and amplify the message that the industry focuses on meeting consumers where they are.

The annual industry awards, hosted by NAMA Chair Heidi Chico, were a special highlight with a ceremony honoring Industry Person of the Year, Joe Hessling; Allied Member of the Year, Mike Lawlor; and Operator of the Year, Jeff Smith.

### EDUCATION

The 2018 NAMA Show presented its most comprehensive educational line-up in the show's history, doubling the number of breakout sessions offered in 2017. Education kicked off with three pre-conference sessions on micro markets, leading sales strategies, and operating a successful convenience services business. Pre-conference programs also included a workshop developed by the National Association of Blind Merchants (NABM) regarding the Randolph Sheppard Act.

Five highly customized tracks of education – Business Development, Technology, Business Operations, Consumer/Marketplace

Trends and Politics & Policy – were offered for more than 1,800 participants.

Included in the line-up was a customized program for alumni of NAMA's Executive Development Program (EDP) and a 75-minute sales session for small operators held on the show floor.

A selection of education downloads are available on the show website: <http://thenamashow.org/speakers-handouts/>.

### NETWORKING

Dynamic networking opportunities and special events included:

- **International Gathering** - International attendees enjoyed an invitation-only event in the New Product Zone, to see the many product innovations happening in the US market and network with industry leaders from around the world.
- **WIN and ELN** - NAMA's WIN and ELN groups each held their own growing and ever-popular networking events

– WIN at Mandalay Bay's Minus 5 and ELN at the Linq's High Roller. WIN also hosted a meet and greet with special guest, President & CEO of the Women's Foodservice Forum, Hattie Hill.

- **Executive Forum** – More than 70 alumni from the Executive Forum 2016 and 2017 events reunited for networking and brunch, where Joe Hessling of 365 Retail Markets, and planning chair of EF 3.0, facilitated an inspiring and interesting discussion with Mitch Lowe, CEO of MoviePass.

"Building on the success and momentum of an exciting week, The NAMA Show exhibitor community donated more than 16,690 pounds of food – the equivalent of 13,900 meals - to Three Square, a Nevada food bank. Many thanks to our exhibitors for giving back to the local community," Nelson said.

"The NAMA team would like to extend a huge thank you to all who helped make The NAMA Show a success. See you **April 24-26, 2019** in Las Vegas," Nelson concluded. ■



*"If you work the show from start to finish, you'll come away with triple digit ROI for your business."*

– Kirby Newbury, CEO, DiscountCoffee.com



*"Attending NAMA helps me stay current with the trends in the workplace! It helps me build better working relationships with my customers."*

– Penny Mahon, Royal Cup Coffee



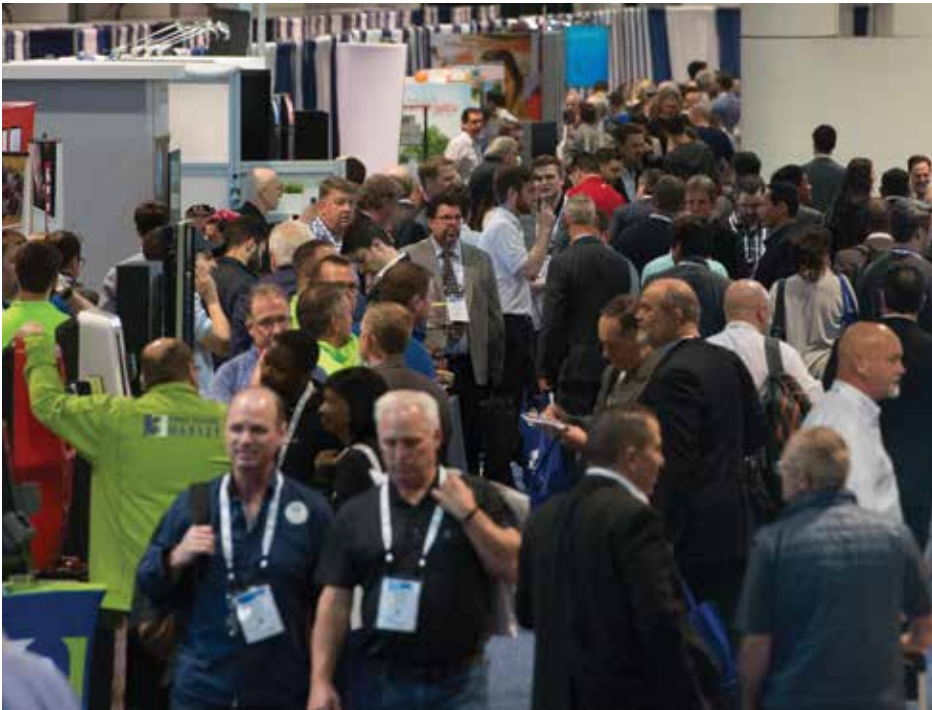




*"I just wanted to thank NAMA for providing a platform for even smaller businesses to receive the latest information on all thing vending."*  
– Tony Gellerman,  
Performance Vending Company







*"This was my first NAMA experience, and it was a fun and informative whirlwind of educational sessions, networking, and learning about what's on the horizon in this industry."*  
— Erin Singer, Atlantis Valley Foods, LLC







# DAN MATTHEWS

## NAMA SHOW SCHOLARSHIP WINNERS

### **Kyle Dunn**

*Machine Cuisine Vending*

**How did attending The NAMA Show impact your business/career goals?**

Attending The NAMA Show has provided me with new and innovative ideas that weren't currently available to me. The business I work for is family owned and operated, and I am the third generation. We operate in a rural section of Arizona, and sales reps aren't a frequent thing in our area. Attending NAMA also put me in contact with other young, like-minded people in the same profession.



**What was your favorite element of the conference?**

My favorite element of the conference was all of the technology that is coming

into convenience services. Seeing industry tech suppliers joining forces and combining their strengths to provide a top-notch level of service and products is exciting to me. We plan on incorporating cashless payment touchscreen units into our business so we can sell ad space to help offset the cashless costs and add revenue on space we are already in while promoting local businesses.

**What's something new that you learned?**

There were quite a few things that I learned while attending NAMA. I loved the idea of being able to sell cold brew coffee from a miniature keg. Being able to charge by the ounce is a huge plus in my eye. It allows us to break the mold on selling coffee at a cheaper rate, because not all coffee is created equal!

### **M. Gaye Tankersley**

*Food Service Solutions, LLC*

**How did attending The NAMA Show impact your business/career goals?**

As a small business owner, it is so easy to focus on the short term deadlines since I am very hands-on with the daily operations. Attending this year's NAMA

Show energized me to focus on longer term strategies and goals.

**What was your favorite element of the conference?**

Seeing the continued creative emergence of our industry! We are a vibrant industry and one to be excited to be a part of on a daily basis.



**What's something new that you learned?**

With the wide range of exhibitors that filled the show floor, our industry is very attractive (to these exhibitors) who see the important work we do in reaching consumers. We are making great strides in being perceived as a retail industry reaching the masses on a daily basis. ■



# NAMA <sup>SM</sup> TAKES THE HILL

JULY 24 - 25 • WASHINGTON, DC







# 2018 Fly-In Agenda



FAIRMONT HOTEL | WASHINGTON, DC

## Tuesday, July 24

- **10:15 AM**  
*Shuttle Departure from Fairmont for EPA meeting (Invitation only)*
- **11:00 AM – Noon**  
*EPA Meeting (Invitation only)*
- **Noon – 1:30 PM**  
*Networking Lunch (Optional)*
- **1:00 – 7:00 PM**  
*Registration*
- **2:00 – 3:00 PM**  
*FDA Nutrition Innovation Strategy Session - Robin McKinnon, Senior Advisor Nutrition Policy, Center for Food Safety*
- **3:00 – 4:00 PM**  
*Fly-In Issue Overview – Eric Dell & Jason Eberstein*

- **4:00 – 5:00 PM**  
*Women in the Industry Event*



You are invited to participate in an event created especially for women in the convenience services industry. Discover the confidence of leadership development, effective personal and professional advocacy, and competency skills development, as women leaders of major industry organizations share their stories and provide insight on how they have impacted the success of their businesses and the industry.

- **5:30 – 6:00 PM**  
*Welcome Reception*
- **6:00 – 8:00 PM**  
*Dinner*

- **9:00 – 10:30 PM**  
*Emerging Leaders Network Event*



ELN Members are invited to a special Fly-In networking event. Relax and connect with friends and colleagues in the nation's capital, in preparation for important and impactful advocacy events on Capitol Hill.

## Wednesday, July 25

- **6:00 – 8:00 AM**  
*Registration*
- **6:00 – 7:00 AM**  
*Breakfast*
- **7:00 AM**  
*Bus Departure from Hotel to Capitol Hill*
- **9:00 AM – 4:00 PM**  
*Meetings with Members of Congress*
- **12:00 – 2:00 PM**  
*Refreshment Services Industry Event*
- **3:30 PM**  
*Bus Departure from Capitol Hill to Hotel*

\*Agenda as of 6/13/2018



**KYLE TRYGSTAD**

Kyle Trygstad, National Journal Hotline editor, will be the featured speaker Tuesday, July 24 at 6pm at the Fly-In.

“With his perspective, as a seasoned political media professional, Kyle will share an ‘insider’s view’ of the upcoming elections. Hired out of college by NBC-TV’s Chuck Todd, Kyle will deliver remarks, followed by a dynamic Q and A session, making this another “don’t miss” event for our industry,” said Jason Eberstein, Government Affairs Director for NAMA.

Specifically, Trygstad will share a granular focus on the elections and analyze how those results have the potential to shape the future of the convenience services industry.

An Arlington, Va., native, he previously served as an editor, features writer and campaign reporter at Roll Call, reported for Real Clear Politics, and was a researcher for The Almanac of American Politics. He has edited columns by Charlie Cook and Stu Rothenberg, and is a regular contributor to National Journal’s Quorum Call podcast and Sirius XM’s POTUS channel.





## FDA Nutrition Innovation Strategy Session



Dr. Robin McKinnon, Senior Advisor for Nutrition Policy at the Food and Drug Administration's Center for Food Safety and

Applied Nutrition (CFSAN), will lead a discussion at the Fly-In, Tuesday, July 24 at 2 p.m. at the Fairmont Hotel.

This session, focused on FDA's Nutrition Innovation Strategy, will give packaged food manufacturers an opportunity to hear first-hand about FDA's strategy for promoting public health through improved nutrition and industry innovation. Attendees will have the opportunity to ask Dr. McKinnon questions on a range of issues impacting their businesses.

"As part of our ongoing work with the FDA, we'd like to thank Dr. McKinnon for leading this very valuable session for our Fly-In participants," said Eric Dell, NAMA SVP of External Affairs. "This is an exclusive opportunity for attendees to interact face-to-face with an FDA expert. We're encouraging our members to take advantage of this value-added dialog with Dr. McKinnon." ■







## Issue Update: EPA Delays Refrigeration Transition

Recently, the Environmental Protection Agency (EPA) issued guidance delaying the refrigerant transition for vending machines, a big win for the entire convenience services industry. Even though the delay was granted pursuant to a recent court ruling, NAMA and industry advocates have been at the forefront, petitioning for this delay. This guidance suspends the January 1, 2019 transition date until the EPA updates regulations requiring a phase out of hydrofluorocarbons (HFCs), currently used in nearly all cold vending machines. While the final transition date remains uncertain, it is expected a new regulation from the EPA could be finalized within a year.

Last summer, NAMA petitioned for this relief and secured a meeting with the EPA

which included industry leaders, advocating on behalf of the industry, so that member businesses are able to navigate design and placement challenges related to the EPA required transition.

The largest challenge to the refrigerant transition is the impact to operators; current safety standards limit the placement of vending machines cooled with a flammable refrigerant. In an effort to change these standards NAMA and equipment manufacturers have partnered to fund and support research that will examine refrigerant leak scenarios to demonstrate that machines with flammable refrigerants are appropriate for placement in any location. NAMA hopes the study will be concluded by mid-June. ■







# NAMA Fly-In: Looking Ahead

BY SHIVANI GUPTA, CANTEEN

### My Role at the Fly-In:

I will help bring to life the education with role play during the training at the Fly-In. This is important, particularly for newer participants so they know what to expect during meetings with elected officials.

### Why the Fly-In is Important to Our Business:

The Fly-In has been great to raise awareness about the convenience services industry in D.C. This effort helps establish contact with our legislators in context of our industry and makes it easier to work with them for any future initiatives.

It's great networking! The Fly-In is an ideal opportunity to meet folks from other companies and understand upcoming state issues. For example, regarding the sweetened beverage tax, we all learned a lot from the experience in Philadelphia; this intel helped reverse the Cook County tax.

### Personally, what about the Fly-In has been most rewarding?

I've participated in two Fly-Ins so far, and each year, we learn something new about the issues that are important to the industry. Just as an example, understanding the FDA requirements on calorie disclosure. We had people from the FDA in the 2016 Fly-In where they explained the nuisances and practical aspects of calorie disclosure.

Also, the Fly-In has established the importance of advocacy at each level and strengthened grassroots state level efforts. I see a lot more communication about and discussion around industry issues and efforts to mitigate risks at the state legislation. The win in Minnesota regarding the state tax for our industry is a great example.

### What are you most looking forward to this year?

I'm looking forward to bringing the convenience industry more to the forefront as well as spending time with folks I see only at the Fly-In. ■

