VALIDATE YOUR INSTINCT 2017
Monday, August 7 - Wednesday, August 9
The Peninsula Hotel Chicago

THE ANNUAL FORUM ANALYTICS CLIENT EVENT

MONDAY  AUGUST 7TH

2:00 pm – 5:00 pm  Registration
Level Four, Grand Ballroom Foyer

2:00 pm – 5:00 pm  Concurrent Training and Q&A with the Forum Team
Level Four, Grand Ballroom and Level Six, Water Tower Park II Room
Walk-up table topics include: trade area development, lifestyle segmentation, regression modeling, healthcare analytics, and sponsor products.

6:00 pm – 8:00 pm  Welcome Dinner at the Peninsula
Level Four, Grand Ballroom and Terrace

TUESDAY  AUGUST 8TH

8:00 am – 9:00 am  Registration
Level Four, Grand Ballroom Foyer

8:00 am – 9:00 am  Networking Breakfast
Level Five, Avenues Ballroom

General Session: The Peninsula, Level Four, Grand Ballroom

9:00 am – 9:15 am  Validate Your Instinct 2017: Welcome and Opening Remarks
Paul Sill – Senior Managing Director and Global Retail Analytics Practice Group Leader, CBRE | Forum Analytics

CBRE
9:15 am – 10:15 am  
**Executive Fireside Chat**

*Paul Sill – Senior Managing Director and Global Retail Analytics Practice Group Leader, CBRE | Forum Analytics*  
*Patrick Sugrue, President and CEO Saladworks, LLC*

The Saladworks concept was developed in 1986 when the first store opened in Cherry Hill Mall, Cherry Hill, NJ with the idea of providing fresh, made-to-order, entrée-sized salads as an alternative food offering for consumers on the go. Saladworks grew locally and as the company experienced incredible consumer response, it became obvious that America was ready for a nationwide salad explosion. With the first franchise unit, Saladworks began its rapid ascent towards becoming the nation’s #1 salad franchise. By 2002, there were more than 30 locations. In 2013, the first of many international locations opened as Saladworks embarked upon creating fans on foreign soil in areas such as Singapore, The United Arab Emirates and Kuwait. In 2015, Saladworks was purchased by Private Equity Firm Centre Lane Partners who saw a brand at the cusp of explosive growth. Today, with more than 100 locations across the globe, Saladworks is prepared to deliver the ultimate in health-conscious, fan-driven dining.

We open our event with an intimate conversation providing C-suite perspective on analytics and their role in a rapidly growing quick service concept such as Saladworks. We’ll explore how analytics are considered for enterprise planning and how SIMMS is viewed from the executive level. We’ll also discuss how market optimization results are interpreted and utilized to get deals done and help Saladworks continue its successful growth story.

10:15 am – 11:00 am  
**Machine Learning: A Comprehensive Overview of Methods and Application in the Real Estate Industry and Beyond**

*Kristian Hammond – Northwestern University Professor of Electrical Engineering and Computer Science and Chief Science Officer at Narrative Science*

Dr. Hammond has a bio that reads like the Dork Diaries: PhD in computer science, BA in philosophy from Yale University, former Professor of computer science at the University of Chicago and currently Professor of electrical engineering and computer science at Northwestern University. He is also the Chief Science Officer for an artificial intelligence firm called Narrative Science based in Chicago. We don’t hold any of that against him. Kristian and Paul became fast friends on their first phone call sharing a mutual concern at the buzz-wordiness of machine learning and artificial intelligence and how much they feel the terms are being misrepresented and misused in the marketplace — to the chagrin of actual data science firms. We hope you’ll come away with a checklist of the data your company needs if it wants to jump on the machine learning bandwagon and a deeper appreciation of the pros and cons, pitfalls and potential of machine learning in a business context.

11:00 am – 11:45 am  
**The Forum Machine Learning Environment: The Role of Regression Modeling and its Place in the Machine Learning Hierarchy**

*Paige Stover – Senior Director of Analytics, CBRE | Forum Analytics*

This session will reveal the Forum Analytics modeling process in deeper detail than perhaps you’ve ever seen it. We’ll explore the structure and process that takes place in data development, model creation, testing, outlier identification, and the thin line between science and intuition as it relates to top-line sales modeling. We’ll also explore other forms of machine learning that may be possible for some of our clients with rich enough data sets.
11:45 am – 1:15 pm  
**Networking Luncheon**  
Level Five, Avenues Ballroom

1:15 pm – 2:00 pm  
**My SIMMS Online: Executive Viewpoints**

Anne Ewing - Senior Vice President of Development, Potbelly Sandwich Works  
Ed Prunier - Vice President of Real Estate Development, VisionWorks  
Phil Russo - Vice President of Real Estate, Captain D’s  

*Moderated by Kenna Brannon – Vice President, Technical Sales, CBRE | Forum Analytics*

In this moderated session, each of our seasoned clients will share stories of how they have integrated or utilized SIMMS in both their strategic planning and day-to-day site selection decision-making process. We’ll hear stories of how market optimization results have been used, revised, and re-processed to produce an actionable real estate blueprint. Clients will share their unique internal processes and how they utilize the information from their SIMMS solutions to make real estate decisions.

2:00 pm – 2:45 pm  
**Bundle This! How Cox Communications Tackled Multiple Modeling and Analytic Initiatives to Drive Strategic Growth**

Ray James – Director of Retail, Cox Communications  
Travis Macdonald – Manager - Distribution Analysis & Strategy, Cox Communications  
Paige Stover – Senior Director of Analytics, CBRE | Forum Analytics

Cox Communications is a privately-owned subsidiary of Cox Enterprises providing digital cable television, telecommunications and home automation services in the United States. As this complex industry continues to evolve, Cox designed brick-and-mortar experience retail stores and, with help from CBRE | Forum Analytics, set about developing a store level sales forecasting model, a highly-customized SIMMS platform for deployment of the model, conducted national market optimization, and separately performed cross-channel interaction and Cannibalytics® models to guide their future growth plans in the retail brick-and-mortar channel. This session will showcase these analytic solutions and provide a candid summary of the successes, challenges, and relevant applications of this work.

2:45 pm– 3:00 pm  
**Coffee and Tea Service**  
Level Four, Grand Ballroom Foyer

3:00 pm – 3:30 pm  
**Social Media Data for Real Estate Modeling: The Next Big Thing…Or is it?**

Jeff Olsen – Senior Solutions Consultant, NUVI, Inc.  
Annie Anderson – Senior Account Director, CBRE | Forum Analytics

This session will explore social media aggregated data in two parts. First, we’ll examine the data sources and process and how it is made available to Forum Analytics to service our clients. We’ll then showcase some of the recent use cases and our broader aspirations for social media data in tightening up sales forecasting models.
NAPA Know How! More Than Just a Model: The Multiple Ways Forum and NAPA Auto Work Together
Grant Nelson – Vice President, Strategic Financial Analytics, US Automotive Parts Group

In 1925, a group of independent auto parts sellers met in Detroit to form the National Automotive Parts Association. Their mission was simple: improve the distribution of auto parts to serve the people and businesses who increasingly relied on cars and trucks for their transportation needs. Nearly a century later, in the U.S., NAPA has 16,000 NAPA AutoCare Centers and more than 6,000 independently-owned and company-owned stores. A division of Genuine Parts Company (NYSE: GPC) and a global automotive aftermarket leader, NAPA operates NAPA Canada, Auto Todo in Mexico and Repco in Australia and New Zealand.

Mr. Nelson will explore the variety of modeling and analytic engagements, as well as the highly-customized programming and optimization efforts developed in support of continued retail store operations for NAPA Auto. He’ll discuss territory optimization, the unique corporate and “jobber” owned business models NAPA utilizes in its retail formats, and how certain acquisitions have, over time, become part of the SIMMS modeling effort.

Closing Strong, TED Talks on the Forum Process: Market Optimization
Alex Ulp, Senior Project Manager, CBRE | Forum Analytics
Catherine Adams, Project Manager, CBRE | Forum Analytics

This final session of the day is where we aspire to convey the comprehensive and, in many areas, proprietary methods for applying your modeling engines after they’re built to maximize their value for your business and form the backbone of your long term strategic growth blueprint and valuation estimations.

Cocktail Reception
Level Four, Terrace (Weather backup: Level Five, Avenues Ballroom)

Dinner at The Peninsula
Level Four, Grand Ballroom

WEDNESDAY
AUGUST 9TH

Registration
Level Four, Grand Ballroom Foyer

Networking Breakfast
Level Five, Avenues Ballroom
## General Session: The Peninsula, Level Four, Grand Ballroom

### 9:00 am – 10:00 am
**My SIMMS Online: Gettin’ It Done on the Front Line**

- **Mike Kormelink** – Vice President, Real Estate, Design, & Construction, Pure Barre
- **Brad Galland** – Director of Real Estate, RaceTrac Petroleum
- **Hailee Bugenhagen** – Senior Strategy Analyst, PANDORA
- **Alice Kreiner**, Market Research Analyst, Sylvan Learning

*Moderated by Tony Conti – Vice President of Business Development, CBRE | Forum Analytics*

This session will provide front-line case studies and experience with using, managing, and deploying SIMMS systems and results across an enterprise. These experienced SIMMS users will share their successes, struggles, and best-use cases on how they successfully manage their SIMMS solution within their companies.

### 10:00 am – 10:45 am
**Beyond the Headlines: Myths vs. Reality in Omnichannel Retail**

- **Melina Cordero** – Americas Head of Retail Research, CBRE

2017 has been one of the darkest years for retail headlines. However, the reality behind these headlines is often more nuanced than the “doom and gloom” titles suggest. Join us as we address the most common misconceptions seen across the industry, specifically related to how the rise of e-commerce is impacting the growth and evolution of brick-and-mortar retail.

### 10:45 am – 11:15 am
**The Forum Analytics Data Showcase**

- **Paul Sill** – Senior Managing Director and Global Retail Analytics Practice Group Leader, CBRE | Forum Analytics
- **Sarah Baumgartner** – Chief Client Officer and Senior Director, CBRE | Forum Analytics

### 11:15 am – 11:45 am
**Attendee Awards**

### 11:45 am
**Conference Adjourns**

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