

The Perspective

Issue 6: Dec 2010

A Publication for the Convenience Store and Petroleum Marketing Industries

Published By:



www.pinncorp.com

Taking a Closer Look at Our Industry

State of the Industry

A Closer Look at Convenience Store Statistics

In Case we Missed you at NACS

Check Out What's New at Pinnacle

Upcoming Events

Pinnacle Summit 2011

My True Confession

Mobile Technology

20 Years of Success

A Look at Pinnacle's Past





Visualize. Customize.

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How can we help your business?
Listen to what our clients have to say...



Retail C-Store

"Computer Assisted Ordering helps our company to have the right products in our stores for the customers, it helps us decrease out-of-stocks, and also decrease our inventory investment; but at the same time, because we're decreasing out-of-stocks, it increases our sales."

Jenny Bullard, CIO, Flash Foods

Point of Sale

"Palm's real driving force for us is the openness of the platform. The ability to get all of the data that the cashier produces and then some from the equipment that's interfaced with the point-of-sale, that kind of thing has really helped Road Ranger take our store operations into the next level by leveraging that data."

Jeremie Myhren, Senior Director of IT, Road Ranger

PINNACLE NEWS COMING UP...

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DECEMBER 2010						
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Date	Event	Location
DEC 1-4	CHS ANNUAL MEETING	Minneapolis, MN
DEC 9-10	SIGMA TRANSPORTATION SHAREGROUP	New Orleans, LA
JAN 17-20	PCATS ANNUAL MEETING	New Orleans, LA
JAN 23-26	SIGMA EXECUTIVE LEADERSHIP CONFERENCE	Big Sky, MT
FEB 22-24	WPMA	Las Vegas, NV

From Bob's Perspective

By the time you read this, Pinnacle will have officially moved into our third decade of servicing the petroleum and convenience store industries. We've been marking 2010 as our 20 year Celebration Year. There certainly have been changes in these past 20 years. In our early years we were delivering DOS based systems running on the still somewhat new and innovative 'personal computers'. Today your mobile device of choice, whether that is a Blackberry, Android or iPhone, has more computing capacity!

Our store level applications back then were focused on efficiently capturing a manager's paperwork and moving it quickly to the central office for integration into the reporting and accounting systems. While we still do that, today's applications

- predict inventory run out's
- assist managers with reorders designed to maximize inventory and increase sales
- deliver consumer value with a myriad of loyalty offerings
- assess competitive price pressures, conveniently and effectively identify clerks with behaviors that suggest poor training or high potential for cash/inventory shortages
- manage vendor inventory held on a pay when you sell basis, and so much more, and all in a real-time environment

Our clients' businesses have changed dramatically as well. Gone are the stalwart and strong margins associated with petroleum and tobacco. Larger format stores, energy drinks, and the return of food service all have become a reality for our clients to understand and integrate into their business. Pinnacle solutions have also evolved to enhance our clients' ability to identify, analyze and implement new operational and marketing programs quickly to maximize profit and competitive differentiation.

I'm confident the next 20 years will be just as amazing in technology evolution and the role of technology in delivering the best convenience experience for the consumer. New innovations in display technology and location based services will undoubtedly amaze us all. Internet retailing/shopping has forever changed traditional brick and mortar retailing – except in the convenience store space. I'm confident that in much fewer than 20 years, convenience retailing will have also been shaped dramatically by internet and mobile technologies. I look forward to seeing how Pinnacle can leverage these to our clients' benefit.

Before I close this issue's Perspective, I want to express to our clients my deepest appreciation for your support over these past 20 years which has allowed us to be of service and build the solutions we offer today. It's been a lot of fun and profitable for us both. If you're not yet a Pinnacle client, may I suggest you consider how our 20 plus years of industry experience can be of assistance to you in dealing with the opportunities you face this next year. I'd welcome the opportunity for us to be of service to you and your company!

Happy Holidays and the very best to you, your family and your company in 2011!



Bob Johnson
President
The Pinnacle Corporation

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QR CODE MANIA!

QR Codes are on Everything!

Don't be surprised to see more of these funny little symbols on Pinnacle marketing collateral; we will be adding QR Codes to more and more of our print and electronic advertising, product information sheets, and even within the Pinnacle Perspective. You might even see them in our booth at upcoming tradeshows.

What are QR Codes?

The QR Code was invented in 1994, originally used for tracking parts in the vehicle manufacturing industry. In recent years, the use of QR codes has expanded to a much broader context across the globe and now they are used heavily for marketing and advertising purposes. A smartphone equipped with a QR code reader application can snap a picture of the QR code; this code can

have many types of information such as contact info, display text, or even instruct the phone to open a web browser and go to a specific URL. QR codes are everywhere now... on the web, on buses, billboards, and magazines; if you haven't seen them, I'd bet that after you read this article you'll start noticing them more.

Some models of smartphones such as Google's Android natively support QR Codes, but don't fret if you use something else. There are free QR Code readers out there that support most devices, and only a Google search (or iTunes App Store) away. And yes, there even exists a QR Code reader for the Blackberry.

If you have a smartphone, be sure to try out some of our QR Codes in this issue of The Perspective. ©



"We need to be PCI Compliant. I don't know where to begin. Isn't there someone who can handle all aspects of making us compliant?"



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COMMITMENT TO OUR INDUSTRY



Strengthening Ties

Strengthening our ties and involvement in industry organizations is one of the best ways to ensure we stay abreast of the most relevant and urgent issues our clients are facing in the industry. Data Security has been THE issue we have all been dealing with over the last few years, and it doesn't look like that will change anytime soon. Data security is an ongoing topic of concern. With security requirements continually evolving, it is difficult to keep up with it all, it's a lot for a retailer to worry about, and if you don't worry about it you could face some pretty harsh penalties. In order to make sure we are on top of this issue, Pinnacle continues to be very active within The Petroleum Convenience Alliance for Technology Standards (PCATS).

Chair of the Committee

This year Drew Mize, Pinnacle's VP of Product Management & Marketing, was elected Chair of the EB2B Committee, also making him a serving member of the PCATS Board of Advisors. The mission of the EB2B Committee is to develop and/or adopt standards for doing business electronically in the areas of retail merchandise, order to payment process, lottery accounting reconciliation, and motor fuels data flow. The committee has both supplier and retailer members. Within the EB2B Committee there are three Working Groups: EB2B Lottery, EB2B Motor Fuels and EB2B Retail. In addition, Drew was elected to the PCATS Board of Directors during the 2010 NACS Show. As part of the PCATS new alignment with NACS, three Board

of Advisor members serve on the new PCATS Board structure. Pinnacle's Director of Fuel Solutions, Brian Reynolds, was elected Chair of the EB2B Motor Fuels Working Group.

About PCATS

The Petroleum Convenience Alliance for Technology Standards (www.pcats.org) is an organization devoted to the development, maintenance, and implementation of standards for the convenience store and petroleum industries. ©





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UTC RETAIL is proud to be the preferred POS hardware platform for Pinnacle's PALM POS™. UTC RETAIL's 3100 Series POS touchscreen workstation features a crisp, bright TFT LCD display and offers plenty of input/output ports, as well as a PCI slot to enhance system flexibility and scalability. Learn what so many other PALM users already have: UTC RETAIL offers the convenience store industry the most durable and reliable touchscreen system on the market. And it's backed by the best service and support in the industry.

In fact, RIS News has recognized UTC RETAIL as the #1 POS hardware provider in North America for Service and Support for the last 3 years.

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THE RETAIL C-STORE SOLUTION: A Q&A SESSION



A Q&A SESSION WITH PINNACLE'S RETAIL SOLUTIONS MANAGER, MELISSA FOX



Q. What are some of the top issues retailers face in their daily operations?

A. Managing store daily information

Ensuring that the store manager has the tools they need to accurately and efficiently enter and finalize their daily paperwork, while providing the home office auditing staff the ability to easily spot problem areas pinpointed by the data.

Managing inventories

Removing the struggle of maintaining the right mix of inventory by using computer assisted ordering and item level inventory controls to suggest what products to order, what products might be over stocked, and what might be in danger of being out of stock.

Managing labor

As labor is always one of the largest expenses for any company, it is critical to have a strong workforce management system in your software arsenal.

Managing data storage

Data, data, and more data. It's coming from everywhere at all times and you need a way to store it in a central location that is easily accessible by everyone in your organization who needs it, whatever their needs might be, and whenever they might need it.

Q. Can you tell us a little bit about Pinnacle's Retail C-Store solutions and how they address these issues?

A. Pinnacle's Retail C-Store suite of solutions provide all the tools necessary to manage store daily paperwork, inventories, labor and data storage.

Store Manager Workstation

Store Manager Workstation, where the store's daily paperwork is imported from the POS and analyzed and reviewed by the store manager, ensures that all totals are in balance and within company defined tolerances. The Store Manager can easily move through their daily paperwork, run on-screen reports through the browser (yes, very green!), and verify

that their inventories, fuel, lottery, and cash over/short values are all in balance.

Home Office Audit

The Home Office Audit solution allows the store accountants to quickly and easily review the store's daily paperwork data. Problem areas are pinpointed through the exception management system which accelerates the ability to fix those problems. As a Symphony Business Platform solution, the Home Office Audit solution is able to take advantage of browser-based technology and enterprise-centric design to provide immediate visibility to critical store issues and to make decisions about those issues, quickly, while they still matter. As information is shared through the screen navigation of the application itself or through reporting, everyone within the organization can get access to the data they need, as they need it. With legacy technologies, and the associated limitations, this was often not the case. With the browser-based design, anyone with approved security rights can get access to reporting to make those critical decisions. Auditing crews, store managers, district supervisors, marketing and price book personnel – can all access data, at any time, for any purpose.



Time Clock/Workforce Management

Labor is always one of the largest expenses for any organization. Pinnacle's WFM solution streamlines your workforce with electronic and browser-based timeclock systems, and provides store managers with the tools needed to manage labor. As an enterprise wide solution utilizing a centralized database for the sharing of information, home office personnel is able to access real-time labor information to address issues before it's too late.

Data Storage and Reporting

In most companies, information is stored in various places and is sometimes difficult to access. Pinnacle's data storage and reporting solutions allow retailers to store data and report against it when they need it and where they need it. Upload and store documents, images, photos, or any other piece of data you choose – all in one central database accessible via a browser from anywhere.

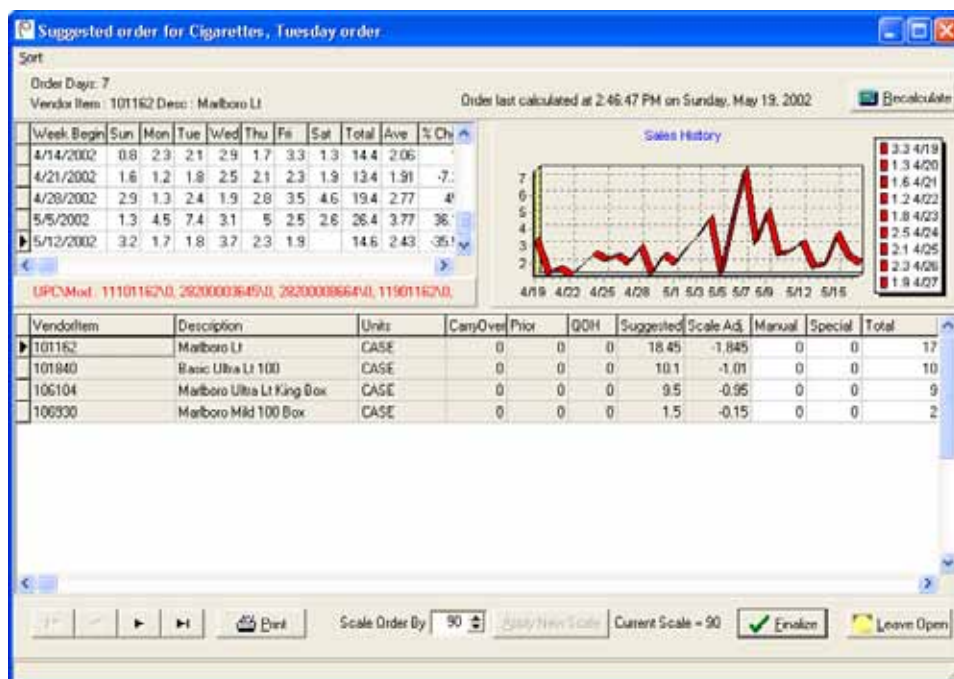
Q. What is CAO and what are the benefits of using it?

A. CAO (Computer Assisted Ordering) is an inventory replenishment system which can use either sales or inventory algorithms to prepare a suggested re-order. Pinnacle's CAO is proven to significantly reduce the amount of labor hours associated with creating a manual re-order; and to improve merchandise inventory levels to significantly improve retailers' bottom-lines.

Before implementing a CAO solution, an item level inventory process must be in place. Receiving inventory by item, making adjustments to inventory at the item level, scanning and selling at the SKU level, and regular inventory audit counting using the Symphony Handheld inventory auditing solution should all be in place if CAO is going to be successful.

The CAO solution will use all of the item information captured at the store together with the ordering criterion for each item to intelligently suggest a re-order. The ordering calculation tools available in the Pinnacle CAO module allow retailers to develop data matrices to evaluate product sales over variable periods to account for variances depending on situations or seasons. Minimum required stock-on-hand rules can be set up that CAO will automatically use in conjunction with available stock data maintained in the system. CAO then automatically recommends orders, which can be evaluated and confirmed by store personnel and immediately transferred to vendors. This automated process reduces the time store managers dedicate to the inventory management and ordering process. Once the CAO module has been set up, there will be less inventory but out-of-stock issues will be avoided.

When configured to use the sales history ordering methods, the CAO module uses the POS Journal Manager transaction data in order to include the time of item sales in addition to the daily amount. When configured to use build-to or reorder point ordering methods, no sales history is used by the CAO module.



Q. Why is it good to have less inventory in your stores?

A. It's important to have the right inventory mix at your store which in some cases means less inventory, usually less of the wrong inventory; and more of the right inventory. If a customer walks into your store and the product they frequently purchase is not available, in the exact shape, size, brand – you potentially might not be seeing that customer again in the future. That's a risk you don't have to take. In addition, controlling inventory in the backroom has always required managers to maintain a delicate balance between inventory levels and out-of-stock conditions. CAO helps control that balance across the entire range of products regardless of demand levels and, to some degree, space allocation.



Q. What does Pinnacle do to address Workforce Management issues?

A. Pinnacle has partnered with Sierra to offer a WFM solution that is designed to help companies be more productive. From employee time tracking and rules based scheduling, to extensive reporting and interfaces to 50+ payroll solutions, Pinnacle's enterprise workforce management solution is a very comprehensive tool to address workforce management issues.

Q. Why is it important to automate time and attendance?

A. Automating time and attendance using a workforce management solution helps make employees more productive, departments and stores run more efficiently, and ultimately helps make companies more profitable. Here are just some of the benefits that you can expect to see with the implementation of the WFM solution:

- Restrict unnecessary overtime and other exceptions by having access to information quickly
- Assign resources more effectively and reduce the time needed to schedule employees.
- Eliminate unauthorized hours
- Replace all manual time sheet calculations, overtime, shift differentials, and rate calculations with 100% pay rule automation
- Altogether estimate the need to calculate time cards
- Significantly cut down on payroll processing time
- Eliminate the need to calculate vacation, sick, or compensation time accruals

As a result, the ROI speaks for itself:

Monthly audit savings, the time it takes to add up timecards	\$360
Monthly lost time savings, employee time theft	\$2,000
Monthly human error factor, mistakes	\$400
Total monthly savings per 100 employees	\$2,760
Total yearly savings per 100 employees	\$33,120

Sierra website: www.time-clock.com

Q. What is the main benefit of having a centralized data repository?

A. Have you ever stopped to think about how many different places within your company data regarding a store is kept? From multiple departments and multiple people's PCs, to file cabinets and employee's heads, data about stores and store facilities, store equipment, etc. is everywhere. The central data repository allows you to keep all of that information in one database, in one place, and make it easily and readily available when you need it.

What size are the coolers? What type of register is installed at the store? Who manufactured the pumps? Get quick answers to maintenance questions before making the trip to the site.

Q. How does this play into Software Version Management?

A. Through the central storage repository, store software version information is also kept so that potential conflicts with versions can be spotted and taken care of. On a daily basis, Pinnacle's store software is polled and version information about each component is retrieved and stored in the central database. This gives the help desk staff a tool they can use to help troubleshoot issues and also provides the IT staff the information they need to determine when upgrades might be necessary.

Q. What types of reports are available through the central database repository?

A. Because the data is controlled by the retailer, meaning any information about the store can be input and accessed, the information on the reports is virtually unlimited. Leasing information and lease agreements, devices, store personnel and phone numbers, equipment, anything you want to track and report against. ©

UPCOMING EVENTS:

PINNACLE SUMMIT 2011:

SAVE THE DATE FOR PINNACLE'S BIGGEST EVENT YET!

By Rosemary Waldrip, Marketing Coordinator, The Pinnacle Corporation

PINNACLE SUMMIT 2011

Next year's Summit is still several months out, but it will be here before you know it! We can't wait to see YOU there!

Our market has seen its fair share of challenges this year; however, continuing to strive for efficiency is what keeps our industry so successful. Through targeted educational sessions, ample networking opportunities, and round table discussions, Pinnacle Summit serves as a platform for growth and insight into how others in our industry attain efficiencies through Pinnacle's software. We will kick off Summit 2011 with a reception at the Dallas Cowboys Stadium beginning at 7:00 pm on Tuesday, September 20. Summit will conclude on Thursday, September 22 at 5:00 pm.

SAVE THE DATE

Pinnacle Summit
September 20-22, 2011
Sheraton Arlington Hotel
Arlington, Texas

REGISTRATION OPENS MARCH 15!

\$1,095 Early Bird Rate - March 15-June 30
\$1,195 Advance Rate - July 1-August 31
\$1,295 Late Rate - After August 31

Sheraton Arlington Hotel
1500 Convention Center Dr.
Arlington, Texas 76011

- Room Rate - \$135/night
- DFW airport - 9 miles away - Free Shuttle Service
- Love Field - 21 miles away



EVERYTHING IS BIGGER IN TEXAS

Q: What do Superbowl XLV, the 2010 NBA All-Star Game, and Pinnacle Summit 2011 have in common?

A: The Dallas Cowboys Stadium!

The Pinnacle Summit 2011 Welcome Reception will be held at the Dallas Cowboys Stadium in Arlington, just 7 months after the NFL crowns the Superbowl XLV champions on the very same field. Please join us for one BIG night of food and fun at the Pinnacle Summit 2011 Welcome Reception!

Q: What do the 2010 ALCS Champion Texas Rangers and Pinnacle Summit 2011 have in common?

A: The Texas Rangers Ballpark in Arlington!

On the 2nd evening of Pinnacle Summit 2011, we will head to the Texas Rangers Ballpark in Arlington - home of the 2010 ALCS Champions, the Texas Rangers! We'll enjoy food, music, cocktails, and a great view of the ballpark from a field-level club behind home base.

MORE INFO COMING SOON!

We are still early in the planning process but feel free to contact Rosemary Waldrip (rwaldrip@pinnacorp.com) with any questions you may have.

DALLAS COWBOYS STADIUM FUN FACTS:

- The Cowboys Stadium site covers 73 total acres; the overall site encompasses 140 total acres
- The stadium is 3 million square feet containing 104 million cubic feet of volume
- Stadium length 900 feet from one end zone retractable wall to the opposite end zone retractable wall
- Canted 800-foot glass wall exterior
- Arches soar 292 feet above playing field the two monumental arches support the retractable roof the world's longest single-span roof structure
- Each boxed arch is 17 feet wide and 35 feet deep
- Each arch weighs 3,255 tons
- Each arch spans quarter-mile in length
- Retractable end zone doors the 180-foot-wide by 120-foot-high operable glass doors, located at each end of the stadium, are the largest operable glass doors in the world
- Five 38-foot panels take 18 minutes to open or close
- At 660,800 square feet, the stadium's roof is one of the largest domed sports structures in the world
- Roof structure consists of 14,100 tons of structural steel (which is equivalent to the weight of 92 Boeing 777s)
- Roof opens or closes in 12 minutes
- Number of bolts in arch spans: 50,000
- Gallons of primer paint: 2,000
- Gallons of finish paint: 2,000 ©

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HOT TOPICS:

FROM THE FUEL ADVISORY BOARD

BY BRIAN REYNOLDS, DIRECTOR OF FUEL SOLUTIONS,
THE PINNACLE CORPORATION



1. HOT TOPIC # 1: FUEL SMART 5.0[®] ENABLED WITH ANDALÉ![™]

Starting with the general release of Fuel Smart 5.0, Fuel Smart is enabled with Andalé for companies desiring to receive precise electronic records of split delivery, splash blending, acknowledgment of deliveries and Bill-of-Lading information in real-time speeds.

Andalé Hand Held Driver dispatch information can now be accomplished either from the Andalé web site or from Fuel Smart Dispatch. Pinnacle Fuel Advisory Board members, Debbie Butler and Larry Cox of Fuel South, Inc. reported success using the Andalé technology and spoke highly of the reliability and ease of dispatching within Fuel Smart 5.0.

Fuel South uses Andalé with all of its 40 drivers and dispatchers; utilizing the hand held technology for delivery to 200+ Flash Food Stores. Bill-of-Lading, Split Delivery and Splash Blend information can now be imported via Andalé into Fuel Smart.

2. HOT TOPIC # 2: FUEL CUSTOMER ACCESS – WHOLESALE FUEL QUOTING AND CUSTOMER MANAGEMENT!

Communication between the home office and the consigned dealer is an industry

wide problem. Pinnacle's new web application Symphony.fuel customer access[™], was also discussed in depth at this quarter's meeting. Symphony.fuel customer access is a wholesale fuel quoting and customer management technology whereby consigned locations can report fuel sales and fuel inventory information and they can automatically import this information into Fuel Smart.

Fuel Customer Access bypasses language barrier issues and makes it easy for consigned dealers to report fuel sales and fuel inventory. Fuel Customer Access provides an automated means for Fuel Smart to receive information. "Corporate efficiencies are increased and frustrations are down due to this new Fuel Smart reporting innovation," reports Advisory Board Member Darrell Jones, CFO of Petro South.

Fuel Customer Access also provides a secure internet process for wholesale fuel customers to receive copies of fuel invoices and statements as well as wholesale fuel quotes.

3. HOT TOPIC #3: DISPATCHER WORKSTATION – MISSION CONTROL FOR DISPATCHERS AND FUEL BUYERS!

Also discussed was a progress report on Pinnacle's Symphony.dispatcher

workstation[™]. Symphony.dispatcher workstation displays real-time fuel inventory information in an easy to read format allowing you to quickly discern your current inventory status. With a simple glance, dispatchers or fuel buyers that are responsible for replenishment, load scheduling and delivery, as well as keeping track of multiple location fuel monitoring, can benefit by determining which locations require prompt attention.

Dispatcher Work Station innovations include inventory status for all locations at a glance, a gallons per hour (GPH) display and continuous countdown toward Product Run Out (PRO).

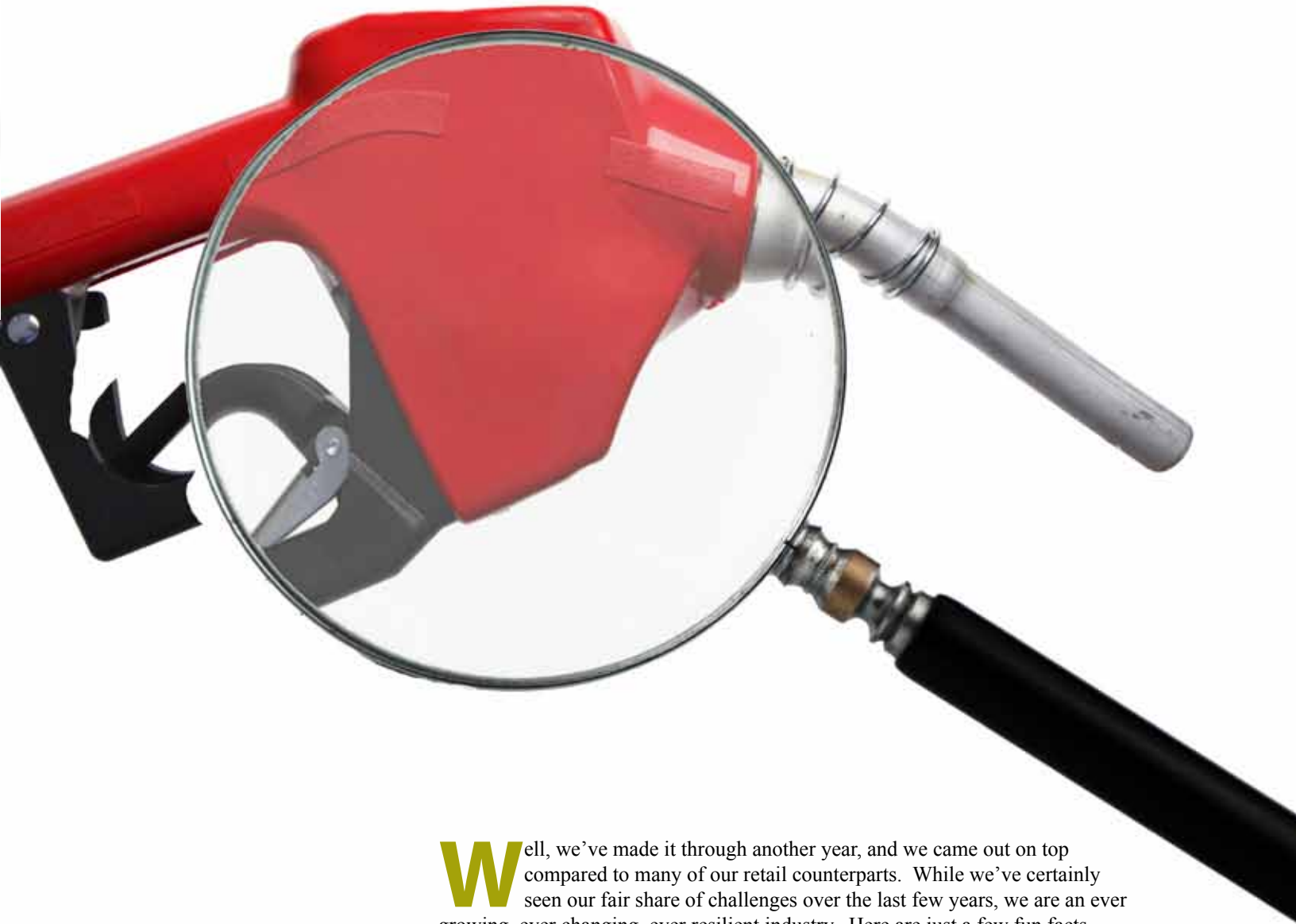
For companies that routinely depend on split deliveries or for anybody that needs to keep a close and constant eye on inventory, Symphony.dispatcher workstation provides a real-time solution for a true "just in time" fuel inventory management system. ©



STATE OF THE INDUSTRY

A CLOSER LOOK AT CONVENIENCE STORE STATISTICS

BY MICHAEL DAVIS, VP OF MEMBER SERVICES, NACS



Well, we've made it through another year, and we came out on top compared to many of our retail counterparts. While we've certainly seen our fair share of challenges over the last few years, we are an ever growing, ever changing, ever resilient industry. Here are just a few fun facts about the state of the convenience store industry...

We currently have around 144,000 stores – that's 50,000 more than warehouse clubs, supercenters, dollar stores, mass merchandise stores, supermarkets, AND drug stores combined! Of these 144,000 stores, over 90,000 of them are run by single store operators.

ABOUT NACS

- Founded in 1961
- More than 2,100 retail member companies
- Operating more than 75,000 stores in the US
- Operating more than 300,000 stores globally
- Members in 49 countries
- 49 of the 50 largest companies in the industry
- 72% of our US members operate 10 or fewer stores
- More than 2,100 retail member companies
- Increasingly diverse retail membership
- Home Depot, Delta Sonic, Kroger, Publix, Giant Eagle, Follett College Book Stores, Barnes and Noble, TA Travel Centers
- PetroCanada (now Suncor), Quickie Convenience Stores, Tesco, BWG, Topaz, Welcome Break, Total, Pick n Pay, Seicomart, SK Energy, Famima, PTT, Woolworths AU, Coles Express, JMEL, OXXO, Repsol, Ipiranga, PetroChina, Sinopec
- More than 1,600 supplier member companies

SHOPPING FOR THE MASSES

With 98% of Americans shopping at c-stores at least once per month, it's no wonder we process around 160 million transactions per day. Here are some other interesting facts about our industry:

- Our 2009 sales totaled \$511 billion.
- We sell 82% of the motor fuel sold in the U.S.
- We employ about 1,700,000 workers on the retail side alone
- Some of our members made Fortune Magazine's 100 Best Companies to Work For in the USA in 2010
- We have stores in every Congressional district
- Our stores are physically closer to the homes of America than any other channel of trade – we are the “neighborhood” store
- We are the mosaic of America – every race, creed, gender, income, age

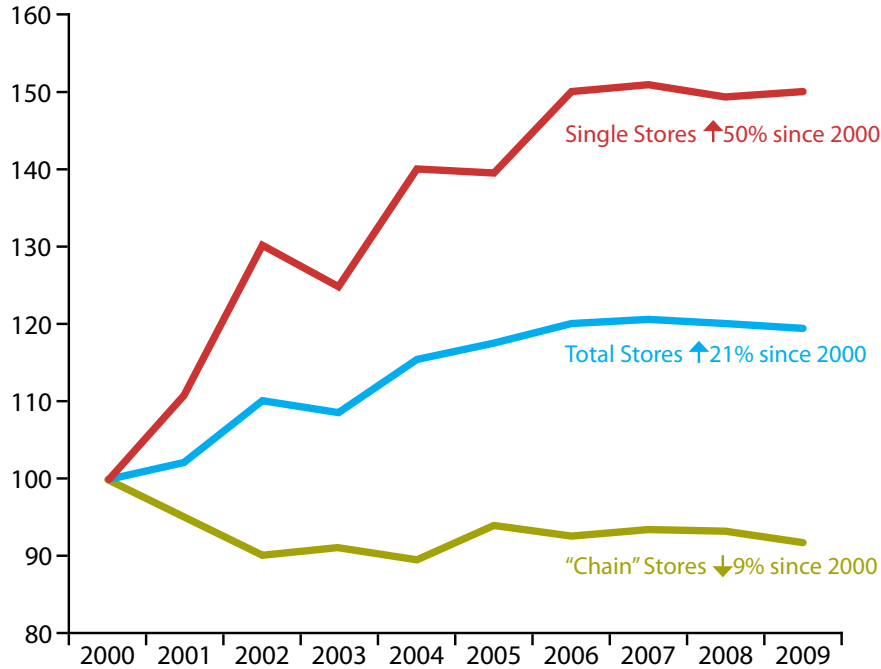
INDUSTRY SNAPSHOT

	2008	2009	% Change
Industry Store Count	144,875	144,541	-0.2%
Industry Sales	\$624.1B	\$511.1B	-18.1%
Fuel Sales	\$450.2B	\$328.7B	-26.9%
In-Store Sales	\$173.9B	\$182.4B	4.9%
Industry Pre-Tax Profit	\$5.2B	\$4.8B	-7.6%
Credit Card Fees	\$8.4B	\$7.4B	-11.9%
Employees (millions)	1.73	1.58	-8.7%
Fuel Pool Margin (cpg)	17.1¢	13.8¢	-19.3%

Source: NACS State of the Industry Survey of 2009 data powered by CSX

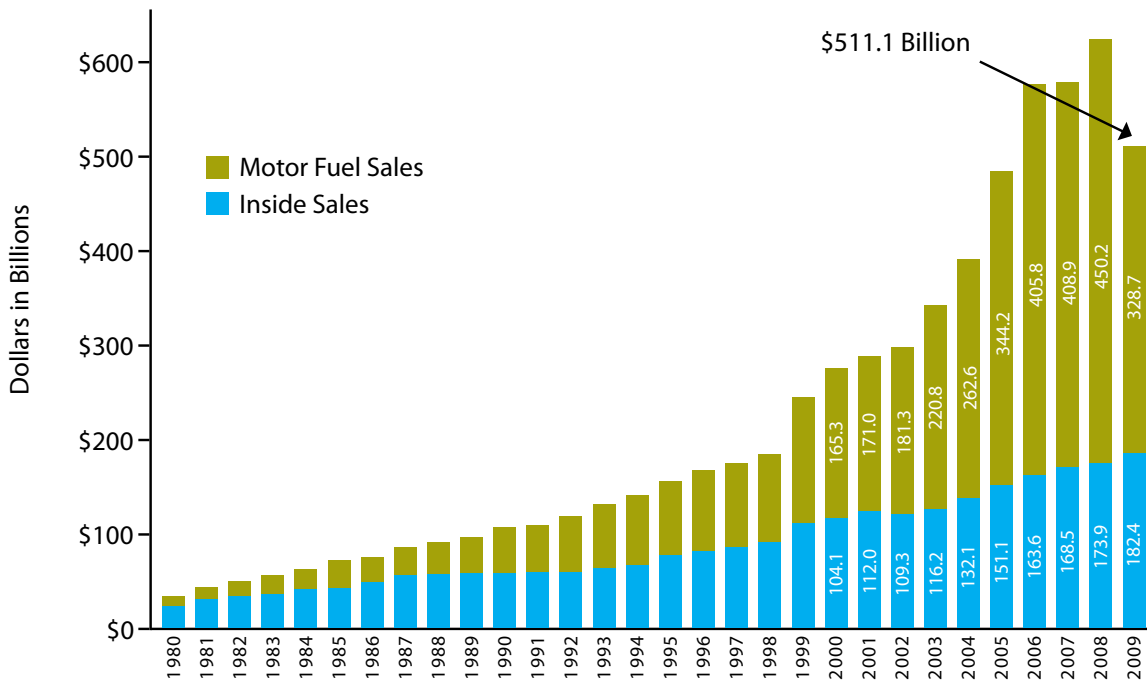


STORE GROWTH BY FIRM SIZE



Source: TDLinX, a service of the Nielsen Company

30 YEARS OF INDUSTRY SALES



Source: NACS State of the Industry Survey of 2009 data powered by CSX

NACS: A 3-PRONGED FOCUS

1. Knowledge

- State of the Industry (SOI) Data through CSX
- Support of Technology standards (PCATS)
- Industry research
- Educational products
- NACS Magazine & NACS Daily
- NACS Help Desk

2. Advocacy

- Government Relations
- Media Relations

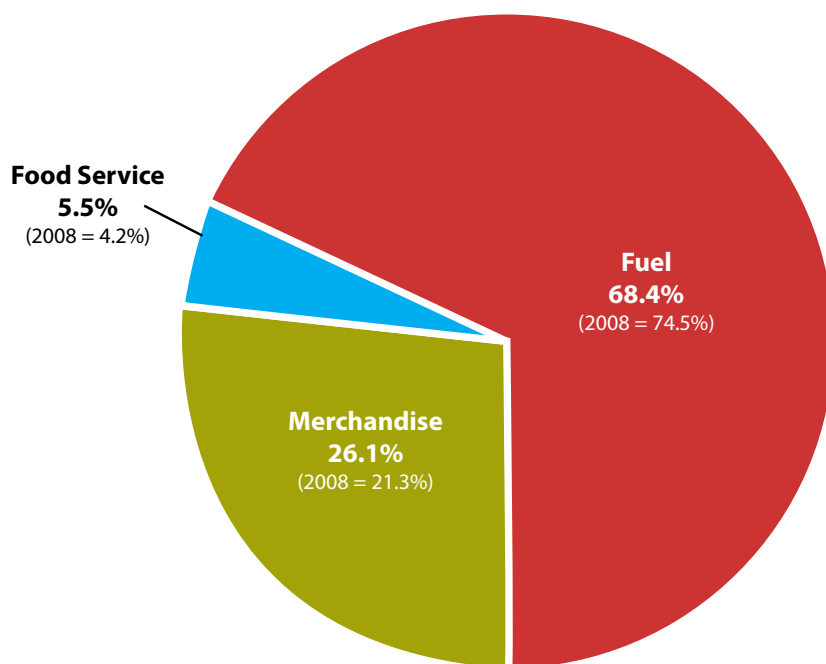
3. Connections

- The NACS Show
- NACStech Show
- SOI Summit
- HR Forum
- Category Management Conferences
- NACS Global Forum & Study Tours
- NACS Social Media

MAJOR THEMES

- Our industry is clearly recession resistant – our in-store sales were up 5% when total retail declined 7%. It seems flat is the new up with some major categories
- High unemployment is a mixed bag – while it is great for employee turnover, it also has a significant negative impact on key category sales
- Fuel margin volatility is our friend – margin stability forces margin compression. We are a tough, but very competitive industry
- Tobacco is back
- Foodservice still offers opportunity but HOW?

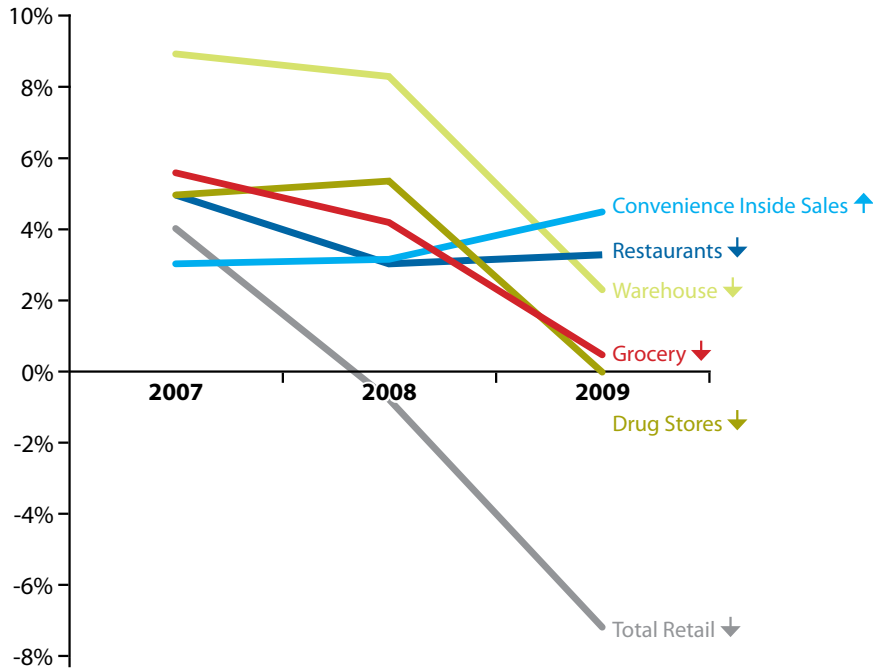
2009 TOTAL SALES CONTRIBUTION



Source: NACS State of the Industry Survey of 2009 data powered by CSX



CHANGE IN ANNUAL SALES BY RETAIL FORMAT



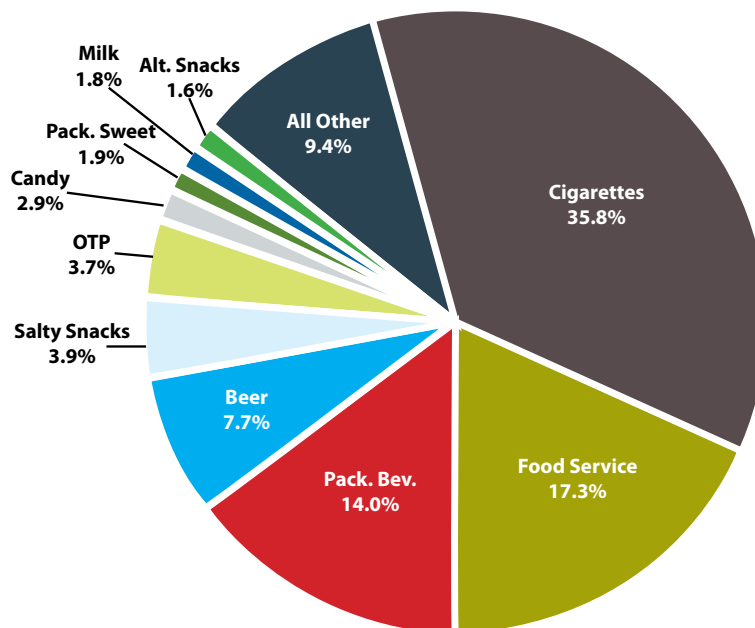
Source: US Department of Commerce and NACS

CATEGORY THEMES

- Out of gas?
- Inside the stores, flat is the new up
- Search for value across all categories
- Tremendous growth in cigarettes and OTP
- Packaged Beverages and Beer have slowed down
- High unemployment in core customer demographic
- Opportunities as economy improves
- Coffee is the margin opportunity we didn't seize
- Outmaneuvered by fast feeders
- Potential growth as employment base grows again

IN-STORE SALES CONTRIBUTION

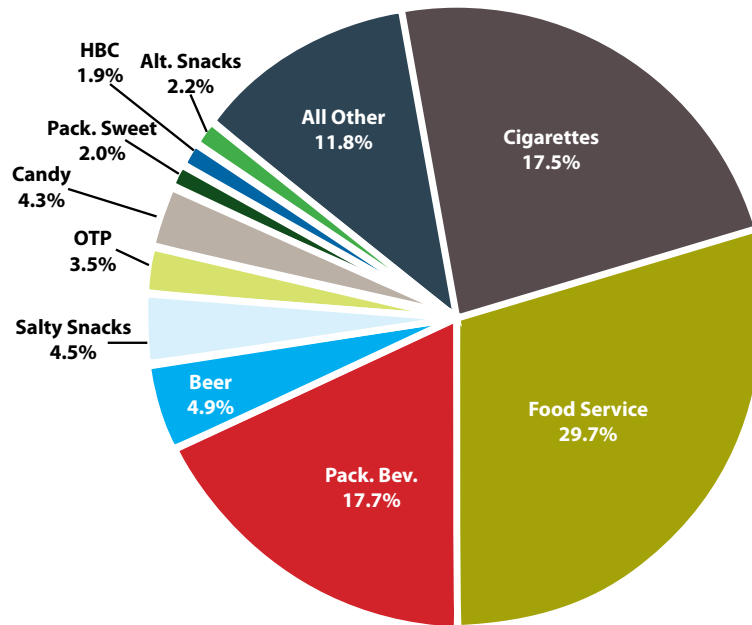
Average Monthly Sales = \$126,198 ↑ 5%



Source: NACS State of the Industry Survey of 2009 data powered by CSX

IN-STORE GROSS MARGIN DOLLAR CONTRIBUTION

Average Monthly Margin = \$40,572 ↑5%



Source: NACS State of the Industry Survey of 2009 data powered by CSX

WHAT ARE THE OTHER ISSUES?

- FDA tobacco regulations
- Healthcare reform legislation
- Menu and food labeling
- Alternative fuel mandates
- The future of fuels
- Environmental sustainability

IT'S EASY BEING GREEN...OR IS IT?

An Opportunity for Convenience and Petroleum Retailers – Why we should be thinking about going “green”:

- Ethical, environmental, and community led points of differentiation are becoming increasingly important
- The convenience store is genuinely local
- Our industry is much less vulnerable to “greenwashing” associations than big business
- It can change the very un-green consumer concept of convenience stores being all about fuel, fast food, and teenagers
- ...and it's a chance to save some money!

ENVIRONMENTAL CONSIDERATIONS

- Energy use reduction
- Refrigeration
- Lighting
- HVAC
- Energy Management Systems

CARBON FOOTPRINT REDUCTION

- Cut energy use
- Green/renewable power
- Sustainable/recycled construction materials
- Natural refrigerants
- Lower carbon transport
- How to go “Green”

NACS commissioned our European relationship partner, Insight Research, to identify best practice in sustainable retailing and to build a “toolkit” for members who want to start addressing these issues:



REASONS TO GO GREEN

- Quick wins
- Refit opportunities
- Strategic overhaul
- Areas covered
- Refrigeration
- Lighting
- HVAC
- Power Supply
- Building
- Communication
-

LEVERAGE THE POWER of MICROSTRATEGY Dashboards and Analytics through PINNACLE EPM

BENEFITS

- 15-40% reduction in energy consumption
- \$2,000 to \$40,000 savings per store
- State and Federal Tax credits
- Customer, community, and media admiration and respect

ABOUT MICHAEL DAVIS

Michael Davis is currently the VP, Member Services at NACS, The Association for Convenience and Petroleum Retailing, responsible for providing products, services, information, and advice to its 2,000 retail and 2,000 supplier members. Mr. Davis spent a total of 14 years with retailers such as Toys "R" Us, Gap, The May Department Stores Company, and Jewel Food Stores. He has over 15 years retail and consumer products management consulting experience with Clear Thinking Group LLC, KPMG Consulting, and Deloitte and Touche. He also was a former NACS Retail member having spent 10 years as the owner/operator of MichaelAngelo's & More, a convenience food and beverage store in Laurel, DE. ©



MicroStrategy's business intelligence platform is embedded in the Pinnacle Enterprise Performance Management (EPM) solution to help convenience and petroleum retail companies analyze product sales performance. MicroStrategy's flexible reporting and analysis tools provide at-a-glance insight to help stores detect and prevent fraud; make more informed decisions on product pricing, promotions and product mix; and track sales performance across categories.

Pinnacle's Mobile EPM capability is portable, graphical and interactive. This kind of efficiency makes real-time mean something:

- Give loss prevention initiatives real immediacy
- Provide Store Operations a tool that delivers information while they travel from site to site
- Get up to the minute sales reports while you're walking through the store

To learn more about MicroStrategy software,
visit www.microstrategy.com

MicroStrategy®

IN CASE WE MISSED YOU AT NACS...



CHECK OUT WHAT'S NEW WITH PINNACLE

BY: TRACIE WILBANKS, MARKETING MANAGER, THE PINNACLE CORPORATION



In case we didn't see you in our booth at the NACS Show earlier this year, we wanted to share with you the advances Pinnacle is making in c-store and petroleum marketing technologies.

Solutions Featured in the NACS Show Cool New Products Showcase:

DISCOVER THE NEW POSSIBILITIES WITH PINNACLE BUSINESS INTELLIGENCE

Electronic Signature Capture is not just a Trend. Save Paper, Space and Money!

- Reduce receipt paper
- Eliminate paper receipt storage space and costs
- Better for the environment - Green
- Eliminate lost receipts
- Store and home office access to electronic receipts
- Reduce time spent on researching transactions

SCAN BASED TRADING: A DISTINCT COMPETITIVE ADVANTAGE

"We're eliminating about 65,000 invoices a year from coming upstream from our stores... that's around \$750,000 in annual savings." Todd Roberge, Price Book Manager, Wilco Hess LLC

- Eliminate Supply Chain Inefficiencies
- Ensure accurate inventory replenishment
- Gain daily insight into product movement
- Increase sales
- Reduce invoice and order processing costs
- Reduce out-of-stocks
- Reduce inventory costs



Scorecards and Analysis: Decrease Loss. Increase Profit.

- Associate weekly performance and shift analysis
- How many served
- How fast
- How much inside traffic
- How many non sales activities are recorded
- What's selling
- What's the over/short
- What's the category breakdown
- Mobile Reporting & Alerts: Get your Information on-the-go

Get your information anytime, anywhere:

- Make decision with the most current data at your fingertips
- Access the most up-to-date sales data to support purchasing discussions with suppliers

Stay Ahead of the Game:

- Fix small issues before they become major problems
- Reduce loss
- Alert by exception
- Customize alerts based on roles
- Send alerts to mobile devices through email
- Include action items

PINNACLE NEXT GENERATION FUEL SOLUTIONS

Fuel Solutions

Today, just in time has become a desired fuel management concept. This can be accomplished using Pinnacle's real-time fuel inventory solutions.

- Accurately predict a product run out time
- Gallons per hour inventory depletion rate
- Location inventory status at a glance
- Real time inventories can be viewed by everyone in the decision making loop
- Reduce inventory run outs
- Maintain optimal inventory levels

Symphony.fuel real-time inventory

Real-time tank inventory information

- Access from any web browser
- Base decisions on real-time inventory data, not history or predictions

Symphony.fuel customer access

Wholesale fuel quoting & customer credit management

- Provide quotes and account information to your customers online
- Minimize customer confusion about changing wholesale prices

Symphony.dispatcher workstation

Mission control for fuel buyers

- Exceptions-based inventory management
- Predictive inventory modeling
- Graphical interface to easily spot issues
- Fuel replenishment
- Multiple location fuel monitoring

Network Assessment Services

Pinnacle's Professional Services team now offers Network Assessment Services that provide a strategic and tactical plan for clients to alter their technical architecture in order to effectively operate Pinnacle software throughout the enterprise.

If you would like more information about Pinnacle or any of our solutions, please visit www.pinncorp.com, or contact one of our representatives:

- **Vickie Dalton**, Western Regional Sales Manager (360.574.4120)
- **Rick Davis**, Central Regional Sales Manager (405.759.7227)
- **Jack Finney**, Northeastern Regional Sales Manager (215.859.2113)
- **Jerome Sedelmeyer**, Southeastern Regional Sales Manager (336.234.8487) ©

BEHIND THE SCENES:



THE MAKING OF PINNACLE'S NACS VIDEO

NACS SHOW EXPO TO GO VIDEO

The Software Your Software Could Be!

For weeks leading up to the NACS show Pinnacle was hard at work getting ready for the NACS Show Expo to Go Video contest. The contest was open to all NACS 2010 exhibitors and required that we submit a 30 second video promoting the topic, "Why NACS Show attendees should visit my booth."

We based our concept for this video on the well-known, incredibly hilarious Old Spice

TV commercial ad campaign. Through some clever re-wording of the script and putting Pinnacle's President and CEO, Bob Johnson in the starring role, we believe we have created a one-of-a-kind video that you cannot help but watch over and over. And that's exactly what we asked you to do! Half of the scores were determined by the number of views, which we won! Thanks for all of your views. The other half was voted on by a panel of retailers assembled by NACS.

Unfortunately we didn't win the overall contest but we definitely had fun competing!

Hope you enjoyed the video as much as we enjoyed making it! ☺





INNOVATIVE USES OF PINNACLE SOLUTIONS:

LOYALTY WEB INTERFACE



Featuring: Ed Freels, Director of IT, Honey Farms

ABOUT THE EXPERT

- **Name:** Ed Freels
- **Company:** Honey Farms, Inc.
- **Number of Stores:** 35
- **Locations:** Worcester, Massachusetts
- **Pinnacle Solutions:** Palm, Oasis, Pharoh, PRM, Price Book, Dynamics, EPM, Loyalink, LoyalWeb
- **Solutions Featured:** LoyalWeb

THE PROBLEM

Honey Farms was implementing the Loyalink program and needed an effective method of entering customer data into the Loyalink database. Honey Farms wished to reward customers who would provide them with specified demographic information by giving rewards not available to general customers. Further, Honey Farms did not want to add personnel to support the program nor purchase additional equipment to scan driver's licenses or other forms of identification.

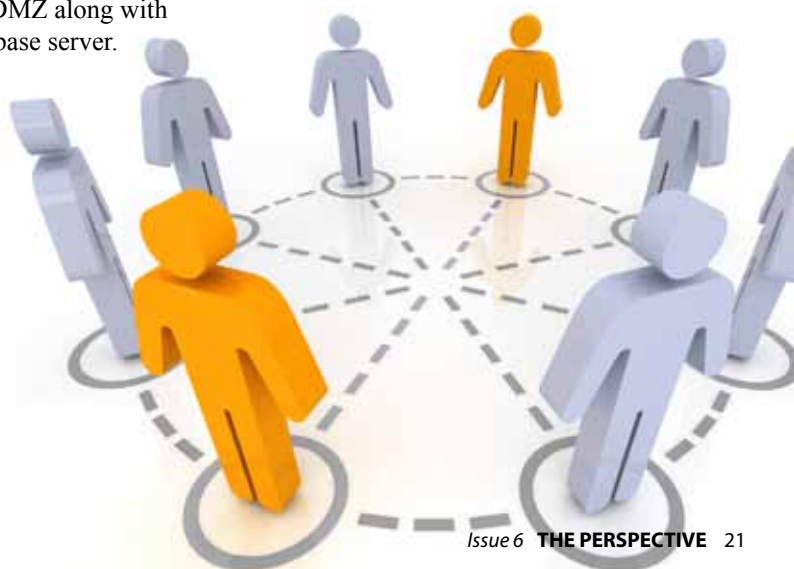
THE SOLUTION

Honey Farms worked with Pinnacle's development team on a project to:

- Utilize LoyalWeb to offer Honey Farms a web based interface for the customer to enter their own personal and demographic information.
- LoyalWeb runs on a DotNetNuke framework and is installed on a web server inside the DMZ along with the Loyalink database server.

BENEFITS OF THE SOLUTION

- The DNN platform allows Honey Farms to develop multiple portals to the same database interface. This serves as a launching point for new company extranet.
- LoyalWeb allows Honey Farms to customize the customer's loyalty experience and further target specified demographics for additional rewards.
- Allows Honey Farms to have a low "going-in" cost to building their loyalty customer database (avoid additional hardware and personnel costs).
- Allows Honey Farms to drive customers to their website – make it a destination. ©





MY TRUE CONFESSION:

MOBILE TECHNOLOGY



By Jane Sinn Gabriel, Retail Solutions Manager, The Pinnacle Corporation

My true confession....
I love my smart phone. Why? Because it's with me everywhere I go AND it's smarter than me. I know, you thought that was my partner in solutions, Melissa. Melissa can't be with me everywhere I go but my smart phone can.

So what does my love affair with my smart phone mean to you? I'll tell you what it means. It means that I'm glowing with excitement about what the future has to offer and I want you to do the same. I know that this thing can get us where we need to go with the tools and information

we need to make smart choices, every day. Join me, let's get there together.

You need more? Okay. Recently, our BI partners at MicroStrategy delivered an illuminating presentation that exposed the wondrous numbers of mobile users in our world. According to The Internet Report from Morgan Stanley, the leap from desktop based internet users to mobile users is an astounding 300% increase, from 1.4 billion users to 5 billion users.

If you're not one now, you're going to be one of those users, very soon. Being as smart as I am today, I say, "Join the fun."



Here's what fun looks like today:

We have a mobile app available today that allows EPM™ users to schedule reports and receive updates automatically. This is different than getting email alerts or accessing the browser via your mobile device. With this mobile solution, each user can select her valued reports, schedule them appropriately and see all the data that is available via the web. The mobile application supports many of the ad-hoc options you have available today via the browser but you don't have to sit down and plug in to get to the information.

Today we support BlackBerry, iPhone and iPad devices. ...love the iPad!

The combination of alerts and optimized access to the actual EPM solution allows you to focus your efforts in the right stores and on the right activities. The EPM team can help you identify what data is best delivered via the mobile application and optimize the view.

What else? How about using mobile applications to work with your shoppers?

Loyalty gets you started. Now there are some real customer relationship opportunities with mobile applications and your shoppers. Today, we offer our Pinnacle Loyalty app which 'puts' the card in your phone. Your loyalty customers can use their iPhone as their loyalty card. How? The app takes the card id entered by the shopper and converts it to a scannable barcode, just like those printed on loyalty cards and key fobs...BUT...it's in the phone.

Let's add fuel to the fire. For those of you on focused on the petroleum side of the industry, you should keep your eye out for the mobile application we are developing on that side of the business. Besides being able to deliver the EPM 70 executive dashboards via EPM, Andalé is the answer for any Fuel Wholesaler or Retailer wanting to receive BOL information instantly with their mobile device.

The latest mobile options can be your company's GPS. They can guide you through your dizzying array of responsibilities and help you focus on the most time and cost effective tasks.

Where do we go from here? The proposals come next and we've received a number of great suggestions. Some are meant to serve you and your associates with your jobs. Others are intended to help you get closer to your shopper and to deliver that ultimate benefit, convenience. What's your best idea? I want to hear it today. Let's build something together. ©



Who Benefits? Everyone!

- Executive and C-level Officers
- Operations Directors, Managers, and Clerks
- Store Support and Personnel
- Suppliers

Get Information Anytime, Anywhere!

- Make decisions with the most current data at your fingertips
- Access the most up-to-date sales data to support purchasing discussions with suppliers

Stay Ahead of the Game!

- Fix small issues before they become major problems
- Reduce loss
- Alert by exception
- Customize alerts based on roles
- Send alerts to mobile devices via email
- Include action items



CUSTOMER SUCCESS STORIES:

ROAD RANGER & PALM POS



Featuring: Jeremie Myhren, Sr. IT Director, Road Ranger

ROAD RANGER BACKGROUND

Road Ranger, based out of Rockford, IL, has 75 convenience stores and travel centers with 25 fast food restaurant locations throughout 7 midwest states.

In 2005, Road Ranger made a decision to begin scanning retail merchandise. The POS system that Road Ranger had in place lacked the retail ability they desired and required. Road Ranger spent a few years looking at and researching various POS systems.

While researching POS systems in the industry, key areas that were important to Road Ranger included integration capabilities, the ability to extract and manipulate data, and the ability to handle their retail and fuel operations.

After thorough evaluation of c-store POS solutions, Road Ranger made the decision to move forward with Pinnacle's Palm® POS. Simply put,

"NO OTHER POS SYSTEM IS AS WELL ROUNDED AS PINNACLE'S PALM POS," said Jeremie Myhren, Sr. IT Director at Road Ranger.

At the end of the day, and all the research, the decision was easy, compared to other POS systems, Palm met all the requirements that Road Ranger was looking for.

Since completing the roll-out of Pinnacle's POS, Road Ranger has been pleasantly surprised to find that Palm gives them more system benefits than they were expecting. Palm does an exceptional job at capturing all of the POS data elements

and the capability to view all of this data electronically. The increased amount of collected and presented data affordable by Palm has also helped Road Ranger increase their control of fraud and allows their store employees to provide customers with faster speed of service. And possibly best of all, the total cost of ownership of Palm was found to be less than their previous POS System. Less expensive, more features, and easier to use, the picture is becoming clear, Palm POS was definitely the right choice!

"PALM POS EXCEEDED OUR EXPECTATIONS. ONCE WE STARTED LOOKING AT THE DATA PALM WAS COLLECTING, WE WERE ABLE TO FINE TUNE AND IMPROVE OUR CONTROLS AND HONE OUR SPEED OF SERVICE. FASTER SPEED OF SERVICE ALLOWED US TO BETTER UTILIZE OUR LABOR HOURS."

Jeremie Myhren, Sr. IT Director of Road Ranger

CHALLENGES

In 2005 – 2006, Road Ranger began scanning retail merchandise. The POS System that Road Ranger had in place at the time was more fuel centric, lacking the retail capability that Road Ranger needed.

OBJECTIVES

Find a POS with the right integration capabilities, the ability to extract and manipulate data, and the ability to handle Retail and Fuel operations.

SOLUTION

Pinnacle's Palm POS™

RESULTS

- Ability to support Retail and Fuel Operations
- Device integration eliminates the need to use multiple machines for specific transaction tasks
- Integration of devices has dramatically increased speed of service, resulting in a reduction of labor hours
- More robust auditing controls led to a reduction in fraud
- Captures all of the transaction elements
- Provides the ability to be able to see electronic data
- POS and Credit Network license are separate and the feature set is not driven by the Credit Network ©



AL'S CORNER & PCI COMPLIANCE



Featuring: Thomas Leise, IT Manager, Al's Corner Stores

AL'S CORNER BACKGROUND

Iowa-based Al's Corner is a Level 4 retailer with 26 Sinclair branded stores. Their Pinnacle products include POS, CAV NIM (with Datawire NAM), PSI NIM, and Oasis BO.

CHALLENGES:

To be PCI compliant they need to secure the card processing environment while allowing necessary systems to communicate internally and externally.

OBJECTIVES:

Al's Corner was looking for an economical, easy to install and maintain, firewall solution.

SOLUTION:

VendorSafe secure firewall: Vendor Safe offers the only low-cost, comprehensive solution to achieve PCI compliance within 30 days.

Backed by a \$50,000 TrustVault™ guarantee, VST provides its Self Configuring Firewall Architecture™ requiring no IP address changes along with a managed VPN to Levels 2, 3, and 4 merchants for a fixed, affordable fee.

- Secure segmented zones
- Easy installation and remote support
- Remote monitoring services

CLIENT OPINION:

"AFTER EVALUATING SEVERAL OPTIONS, WE DETERMINED VENDORSafe WAS THE SMARTEST CHOICE FOR AL'S CORNER. IT PROVIDES THE AFFORDABLE SECURE SEGMENTATION WE NEED FOR OUR STORES, AND THE REMOTE MONITORING VENDORSafe OFFERS MAKES IT VERY LOW-MAINTENANCE FOR US."

Thomas Leise, IT Manager, Al's Corner Stores

RESULTS:

- Based on financial analysis, VendorSafe was the most economical choice.
- VendorSafe is endorsed and used by Sinclair.
- They are using a 4 segment solution,- POS is separate from BO and DVRs.
- Only pricebook updates via email are allowed inbound.
- CAV NIM and PSI NIM are allowed outbound access.
- 6 implementations so far, each taking 1-2 hours. They anticipate as low as a 30 minute install with remaining stores.
- VendorSafe does the configurations.
- VendorSafe handles the monitoring and alerts Al's of any problems. ©



2010 NEWBIES:

NEW CLIENT PARTNER RELATIONSHIPS



NEW CLIENT PARTNER RELATIONSHIPS IN 2010!







At Pinnacle, we partner with our clients to facilitate relationships that are mutually rewarding. We do our best to listen to your needs to ensure we develop the solutions you require to improve your margins, reduce your expenses and increase your bottom-line. We also pay attention to the industry we serve, focusing on the development of solutions to address top industry issues such as escalating credit card fees, fuel price volatility, supply issues, consumer loyalty, real-time business intelligence, audit controls, and inventory management.

OUR COMMITMENT


Pinnacle is committed to forming strong and perpetual partnerships with our clients. As a technology provider, it is our responsibility to make sure you are on the leading edge of automation and in front of your competition. As your business grows, your technological requirements expand, and Pinnacle is with you every step of the way, expanding your software solutions to grow with your business.

In 2010 Pinnacle experienced several successes with new client partner relationships. Join us in welcoming the following new clients to Pinnacle.



BF HOLDINGS

- Rio Rancho, NM
- Pinnacle Products: Palm POS, Symphony Auditor, Pricebook, MWS, Loyalty and EPM, Dynamics Great Plains, Food Service      



CHS INC.

- Inver Grove Heights, MN
- Approximately 1500 Cenex branded C-Stores
- Pinnacle Products: Palm POS 




THE CRACKERBOX FOOD STORES, LLC.

- Monticello, AR
- Pinnacle Products: Symphony MWS, Auditor, PriceBook, Symphony handheld, FuelSmart, and Dynamics GP  

DUNCAN OIL COMPANY INC.

- Beavercreek, OH
- Pinnacle Products: Andale  



DURAN OIL COMPANY

- Trinidad, CO
- Pinnacle Products: Price Book, Journal Manager, Symphony manager workstation, Symphony auditor, FuelSmart, and Microsoft Dynamics   



GREENWAY CO-OP INC.

- Rochester, MN
- Pinnacle Products: Palm & POS Manager 




KARS PETRO DISTRIBUTORS

- Cocoa, FL
- Pinnacle Products: Fuel Smart  

STATE OIL

- Libertyville, IL
- Pinnacle Products: Fuel Smart & Dynamics GP  

TBS PETROLEUM, LLC

- Redding, CA
- Pinnacle Products: Fuel Smart, Microsoft Dynamics   

VISUALIZE. CUSTOMIZE.

Software Solutions built to fit your needs.

Providing Automation Solutions for 20 Years!



Retail C-Store



Point of Sale



Loyalty



Food Service



Retail Fuel



Wholesale Fuel



TWENTY YEARS OF SUCCESS: A LOOK AT PINNACLE'S PAST

PINNACLE CELEBRATED OUR 20TH ANNIVERSARY IN 2010. HERE ARE A FEW MILESTONES AND ACHIEVEMENTS ALONG THE WAY.



Pinnacle Founded

Oasis Manager Workstation



Palm POS



Pinnacle acquires
Software Assurance
Corporation (SAC)

Pinnacle earns Microsoft's
Retail Application
Developer Award

New Corporate Office in
Arlington, TX



1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001

Pinnacle hosts 1st
annual Pinnacle Summit
client conference

Pinnacle becomes Microsoft
Partner for Dynamics GP

Pinnacle earns
Microsoft's Retail
Application
Developer Award

Pinnacle earns
Microsoft's Retail
Application Developer
Award





New Logo

Pinnacle earns Microsoft's Retail Application Developer Award
*Microsoft's last year for this award

Pinnacle renews Microsoft Gold Certified Partner status



Pinnacle earns Microsoft Gold Certified Partner status

Palm certified as PCI Compliant

Palm.kiosk



NACStech "Best Tech Trend" Award



Pinnacle renews Microsoft Gold Certified Partner status

Pinnacle acquires assets of Intura Solutions

Fuel Customer Access

Pinnacle supported loyalty cards in 1+ million consumer's hands



2002 2003 2004 2005 2006 2007 2008 2009 2010

Loyalink



Pinnacle earns Microsoft Gold Certified Partner status

POS Manager



Symphony.auditor



Symphony.mws



Pinnacle crosses over 100 employees mark

Pinnacle renews Microsoft Gold Certified Partner status

LoyalPay and LoyalDebit



Andale



Orlando, FL (Winter Park) offices move to new building

Pinnacle adopts "Agile" development process

Introduction of RSS Client News Feeds

Pinnacle renews Microsoft Gold Certified Partner status

Dispatcher Workstation



EPM Mobile



NACStech "Expo Trends" Award

iPhone Loyalty App



Finding bad apples has never been easier.



Gulfcoast's Loss Prevention Software Suite saves time, saves money, and saves your sanity.

Gulfcoast Storekeeper's™ customizable, flexible and versatile Loss Prevention Suite uncovers cash register fraud and undesirable activity immediately, instead of hours, days or weeks later.

Gulfcoast is the industry innovator, with solutions that are truly plug and play. Our DVR's and integrated local/remote loss prevention software suite integrates seamlessly with major POS systems, and virtually any other data generating device including; smart safes, IP cameras, money order machines, time clocks, tank monitors, access control, alarm systems, power management systems and more.

Why is Gulfcoast the best choice for your retail solution? It works better. Our software acquires and standardizes data from multiple devices in realtime and lets you create and save rules that protect your operation. When rules are violated or exceptions generated, alerts are broadcast immediately to designated local and corporate staff for action.

The Gulfcoast Loss Prevention Software Suite Provides:

- Intelligent exception-based data mining identifies operational issues across your entire retail chain - with unmatched ease.
- Real-time cash-management monitoring is instantly accessible at multiple levels: store, region, corporate.
- Intuitive electronic journaling - saves time when searching and reviewing events.
- Integrated local and remote playback software for browsing data, video, and audio.
- Extensive print reporting capabilities.
- Nationwide hardware, software, and dealer support featuring 24-hour hot swap replacement guarantee.
- Competitive pricing with accelerated ROI.

Gulfcoast's state-of-the-art Digital Video and Data Recorders feature best in class video compression and remote view technologies. Add the innovative spirit of our team, and our first to market reputation, and the decision to choose Gulfcoast has never been easier. Visit our booth at the NACS Expo and learn first-hand.



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Clearwater, FL 33755

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