

DAVID SOBEY RETAILING CENTRE

RISE

Retail Innovation, Strategy and Excellence

May 10-14, 2027

Sobey School of Business
Saint Mary's University

Retail Innovation, Strategy, and Excellence **(RISE)**

Retail has entered a new era of opportunity and disruption. Consumers are shopping in stores while demanding seamless omnichannel experiences. Advances in AI and data are transforming how retailers make decisions about pricing, assortment, and marketing. At the same time, retailers face persistent pressure from inflation, supply chain volatility, labor shortages, and rising expectations from employees and society. In this environment, success requires more than operational efficiency. It demands leaders who can create customer value, make smarter decisions using data and AI, and translate strategy into consistent execution across the organization. This intensive program equips retail leaders with the frameworks, insights, and practical tools needed to drive performance today while building the capabilities required to compete in a rapidly evolving retail landscape.



Who Should Attend

This program is designed for retail leaders who are responsible for shaping strategy, driving performance, or preparing for broader leadership roles. Participants may include directors, senior directors, and vice presidents in larger retail organizations, as well as senior executives, founders, and owners of growing retail businesses. The program is also well suited for high-potential leaders being prepared for expanded strategic and operational responsibilities. Individuals from merchandising, marketing, digital, operations, strategy, analytics, and related functions will benefit from the integrated perspective offered throughout the week.

Program Objectives

Participants will develop the ability to:

- **Create customer and firm value** by understanding the drivers of modern retail demand and translating insight into strategic priorities.
- **Leverage data, analytics, and AI** to improve critical retail decisions and identify high-impact opportunities for innovation and growth.
- **Achieve execution excellence** through stronger commercial discipline, operational effectiveness, and workforce capability.
- **Lead transformation and organizational change** to scale new capabilities and sustain performance in an increasingly complex retail environment.



Value-Added Features of **RISE 2027**

Applied Retail Transformation Project

Throughout the program, participants will work on a real business challenge from their organization, applying the frameworks and tools introduced during the week. The project allows participants to translate customer insight, strategic thinking, AI-enabled decision making, and execution discipline into a concrete initiative relevant to their company. On the final day, teams will refine and present their proposals, receiving structured feedback from faculty and peers. This applied exercise ensures that participants leave the program not only with new ideas, but with a well-developed initiative that can be advanced within their organization.

Optional Coaching / Advisory Session

Thirty days after the program, participants may schedule an optional one-on-one advisory session with program faculty to discuss the implementation of their initiative. These sessions provide an opportunity to refine ideas, address organizational challenges, and receive targeted guidance on advancing the project within their company. The advisory session helps participants translate insights from the program into practical actions that support both personal leadership development and organizational performance.

60-Day Implementation Forum

Approximately 60 days after the program, participants will reconvene in a virtual session to discuss the progress of their initiatives and the challenges encountered during implementation. This forum provides an opportunity to share experiences, exchange practical insights with peers, and receive additional guidance from faculty. By reconnecting after participants have had time to apply what they learned, the session reinforces accountability and helps translate the program's insights into sustained organizational impact.



MODULE 1

CUSTOMER VALUE & STRATEGIC ADVANTAGE IN MODERN RETAIL

~ Decode the evolving drivers of customer value and loyalty

~ Identify high-impact opportunities across the customer journey

~ Make sharper where-to-play and how-to-win strategic choices

~ Build strategic optionality in a changing retail landscape

DAY 1 - MAY 10, 2027

Creating Customer Value in Modern Retail

Morning: The program begins by framing how value is created in modern retail, grounding participants in the structural shifts in customer expectations, omnichannel behaviour, and evolving trust dynamics. The focus is on moving beyond product-centric thinking toward a disciplined understanding of what truly drives customer choice, loyalty, and long-term value creation.

Afternoon: Participants translate customer insight into strategic action by examining the full customer journey and diagnosing where meaningful value can be created or lost. The discussion then turns to identifying and prioritizing the customer opportunities that offer the greatest potential for growth, differentiation, and stronger relationships.

DAY 2 - MAY 11, 2027

Retail Strategy & Strategic Optionality

Morning: Building on customer insight, the program turns to the strategic choices retailers must make in a highly competitive and margin-pressured environment. Participants explore how successful retailers define where to play and how to win across categories, channels, and value propositions, while balancing growth ambitions with operational realities.

Afternoon: Attention shifts to building strategic resilience through dynamic capabilities and a disciplined test-and-learn mindset. Participants examine how leading retailers create strategic optionality—developing the ability to experiment, innovate in response to emerging opportunities, adapt quickly, and respond to market disruptions while maintaining a clear strategic direction.

DAY 3 - MAY 12, 2027

AI & Decision Intelligence in Retail

Morning: The focus moves from strategy to enablement, examining how innovation and AI can create measurable value when tightly linked to retail decisions. Participants cut through the hype to understand where advanced analytics and AI meaningfully improve forecasting, pricing, personalization, and merchandising outcomes. The session also introduces the fundamentals of AI governance, highlighting the risk, accountability, and responsible-use considerations that shape how AI initiatives are deployed in retail organizations.

Afternoon: The emphasis shifts to embedding intelligence into everyday decision processes rather than treating analytics as a separate technical function. Participants develop a pragmatic roadmap that prioritizes high-impact AI use cases while identifying the data, governance, talent, and organizational capabilities required to scale them effectively.

DAY 4 - MAY 13, 2027

Retail Execution Excellence

Morning: With strategy and decision intelligence in place, the program turns to the drivers of retail performance. Participants examine how pricing, promotions, and emerging revenue streams such as retail media shape both margin performance and customer perception. The discussion emphasizes disciplined use of commercial levers and how data-driven experimentation can improve profitability while preserving customer trust.

Afternoon: The focus then broadens to the operational and human foundations of execution excellence. Participants explore how operating models, decision processes, and cross-functional coordination influence execution across stores, digital channels, and supply chains. The discussion concludes with a strategic examination of the workforce challenges facing retail (skill gaps, automation, labor cost pressures, and the sector's struggle to attract and retain talent), highlighting how a stronger employee value proposition and targeted capability development are essential for sustained operational excellence.



MODULE 2

INSIGHTS-DRIVEN RETAIL PERFORMANCE & EXECUTION

~ Focus on high-impact AI and analytics use cases in retail

~ Embed decision intelligence into everyday retail decisions

~ Strengthen pricing, promotions, and emerging revenue streams

~ Align operating models and workforce capabilities for execution



MODULE 3

LEADING AND SCALING RETAIL TRANSFORMATION

- ~ Lead transformational change in complex retail organizations
- ~ Address capability, culture, and talent challenges
- ~ Integrate customer, strategy, AI, and execution insights
- ~ Develop a practical retail transformation roadmap

DAY 5 - MAY 14, 2027

Scaling Retail Transformation

Morning: The final day begins with a focus on leadership and the organizational realities that determine whether transformation efforts succeed. Emphasis is placed on transformational leadership and how leaders create urgency, align stakeholders, and mobilize teams around change initiatives. Participants reflect on capability gaps, cultural barriers, and the leadership behaviors required to sustain momentum in complex retail environments.

Afternoon: The program concludes with the integration of insights from the entire week into a coherent transformation agenda. Participants synthesize customer, strategy, AI, execution, and leadership perspectives into a focused roadmap and refine their plans through peer and faculty feedback, leaving with a clear and actionable path to drive impact within their organizations.

Instructors

Leading Saint Mary's University Faculty and Industry Experts

Special industry guest speakers to be announced



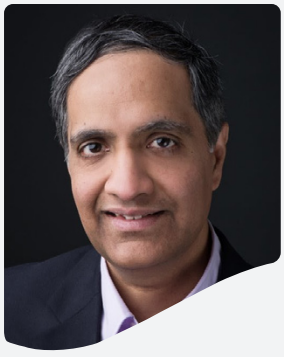
Doug Stephens

Doug Stephens is the Founder and CEO of Retail Prophet, and widely regarded as one of the world's foremost retail industry futurists. His creative and intellectual work have influenced the strategies of global brands including IKEA, Nike, Coca Cola, Louis Vuitton, and L'Oréal.

He is an international bestselling author of three books on the future of retail including his most recent, Resurrecting Retail: The Future of Business in a Post-Pandemic World.

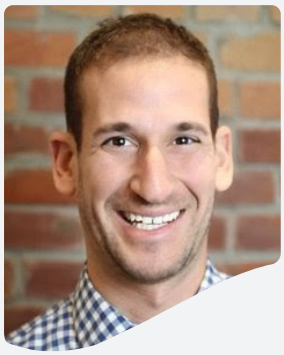
Doug is also a nationally syndicated retail columnist for CBC Radio and sits on multiple corporate and academic advisory boards, including the David Sobey Centre for Innovation in Retail at St. Mary's University.

His unique perspectives on retail and consumer behavior have been featured in many of the world's leading publications and media outlets including The New York Times, The BBC, The Business of Fashion, The Wall Street Journal and Fast Company.



Ramesh Venkat, PhD

is the Director of the David Sobey Retailing Centre and an Associate Professor of Marketing. He was formerly Associate Dean of Masters Programs and Director of the Sobey MBA Program. He has published over 50 articles and reports on topics such as online marketing, customer engagement, customer satisfaction, customer experience and brand strategy. Ramesh is the author of a book on online marketing and has co-authored chapters in several other marketing books. He is working on a forthcoming book on brand strategy in a digital marketplace. Through his company CeQuotia, Ramesh offers customer experience measurement and retail analytics solutions.

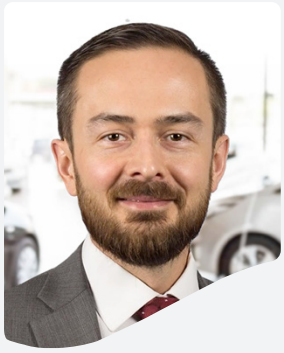


Ramy Nassar

Ramy Nassar is the former Head of Innovation for Mattel, where he harnessed emerging technologies to reinvent one of the world's most iconic brands — including contributing to the production team for the Barbie movie, which grossed $1.5B worldwide. Today, he brings that same builder's mindset to leaders, helping them Navigate What's Next in AI and emerging technology with clarity and confidence.

Ramy doesn't watch the future unfold from the sidelines—he's on the court, shaping it. With 25+ years of experience and partnerships with over 250 leading organizations including Apple, TD Bank, TELUS, Verizon, New Balance, and the Government of Canada, he combines hands-on technical depth, strategic foresight, and powerful storytelling to turn complexity into clarity and disruption into opportunity.

Author of the AI Product Design Handbook and a faculty member at universities in Canada and Europe, Ramy equips leaders with practical frameworks to reimagine business models, rewire risk, and accelerate innovation. A trusted futurist with a global track record, his keynotes and workshops leave audiences energized, empowered, and ready to stop reacting to disruption—and start designing the future.



Jeremy Adamson

Jeremy currently serves as VP of Business Intelligence at Steele Auto Group where he leads the data and analytics function. He is a leader in data and analytics strategy and holds an Executive MBA from the University of Calgary and a Master's degree in Engineering from the University of New Brunswick. He has a broad range of experience in transportation, energy, financial services, and public administration, and has worked with several major organizations to improve customer and employee experience. He writes and speaks on the topic of data science and artificial intelligence and teaches AI strategy at the University of New Brunswick.

Jeremy is the author of two books "Minding the Machines: Building and Leading Data Science and Analytics Teams" and "Geeks with Empathy".



Brynn Leard

started her retail career in the hardware sector with Kent Building Supplies. She managed several categories and was Group Merchandising Manager. She joined Clear Cell, a UK-based retail analytics company, progressing to the role of Vice President. In that role, Brynn worked with senior-level executives in several large retail companies in Canada and US, helping them gain deeper insights from data analytics. Most recently, Brynn was Vice President of Customer Strategy at Nova Scotia Liquor Corporation (NSLC). Brynn has been involved in the creation and delivery of the RISE program from the beginning.



Jason Rhinelander, PhD

Dr. Jason Rhinelander is an Assistant Professor in the Division of Engineering, Faculty of Science, at Saint Mary's University. He is the inaugural Head of Technology and Innovation at the David Sobey Retailing Centre where he applies machine learning and artificial intelligence solutions to real-world challenges. His research interests include AI ethics, retail applications of machine learning technologies, and computer vision. Dr. Rhinelander holds a PhD in Electrical and Computer Engineering from Carleton University in Ottawa, ON. He also holds an M.Eng in Electrical Engineering and a B.Eng in Electrical Engineering (Computing and Communications specialty), both from Memorial University in St. John's, NL.



Wendy R. Carroll, PhD, CPHR

Dr. Wendy Carroll is an award-winning educator, practice-oriented researcher, and Associate Professor of Management at the Sobey School of Business, Saint Mary's University, where she also serves as Academic Director of the Executive Doctorate of Business Administration (EDBA) program. Before entering academia, she worked in frontline environmental and operational roles, managing teams and helping design business processes, experience that continues to inform her practical approach to leadership and workforce strategy. Her research and teaching focuses on the future of work, evidence-based practice, and emerging HR practices. She has received multiple student- and peer-nominated teaching awards and was named one of the Top 25 HR Professionals in Canada by Canadian HR Reporter.



Mark Innes

currently serves a Associate Partner, Retail & CPG at IBM and is a Saint Mary's University MBA graduate with over 30 years as a retail leader in world class food, drug and mass organizations such as Loblaws, Empire, Target and Pharmasave. His retail journey has enabled him to gain senior leadership experience in marketing, merchandising and operations, and he has applied his skills, helping organizations successfully adapt, change and grow in their respective segment. Through it all Mark has always maintained his thirst for learning which makes him a great fit in his current role as Chief Retail Engagement Officer. Mark is passionate about helping the David Sobey Retailing Centre grow its presence to become one of the leading retail universities in Canada by creating opportunities for student and faculty to work directly with retailers on pivotal projects.



Hichem Mefaredj

Hichem is an international business consultant, entrepreneur, and marketing lecturer with over 22 years of leadership retail experience in multiple countries. He is the founder of Need Business Advice Consulting, advising retailers and consumer brands on market expansion, merchandising strategies, and omnichannel retail development. He is also the co-founder of Le Marché Parisien, a French café and gourmet grocery concept bringing authentic French products and experiences to Canada.

Earlier in his career, Hichem held senior leadership roles with Carrefour (French retailer) where he helped develop merchandising and commercial strategies across 17 countries. He was part of the team that established Carrefour's operations from scratch in Iraq and Kenya and participated in the opening of numerous retail stores across several countries.

Hichem currently provides international consulting services and serves as a part-time Marketing Lecturer. He is pursuing a Doctorate in Business Administration, focusing on collaboration between consumer-packaged goods companies and their distributors in emerging markets.



Bonnie MacDonald

Bonnie MacDonald is the founder of Shop Tonic Business Consulting. A consultancy built to serve and support organizations as they utilize customer experience centered thinking to grow their business.

A background in specialty retail and hospitality, in senior executive roles, for International and Canadian companies-as President of Payless ShoeSource Canada and General Manager and Executive Vice-President of The Body Shop Canada-has provided rich experience from strategy to execution and the importance of operations in between.

Bonnie also acts in a business advisory capacity for several companies.



Details

Dates:

May 10-14, 2027

Location:

Saint Mary's University, Halifax, NS

Registration/More Info:

Please email davidsobeycentre@smu.ca

Saint Mary's University

davidsobeycentre.ca