



## **Registration & Continental Breakfast**

**7:30 – 8:30 a.m.**

## **General Session**

**8:30- 10:30 a.m.**

**Welcome Remarks** Lesley Berglund, WITS Event Co-Chair  
J. Smoke Wallin, WITS Event Co-Chair

### **Technology: Linking the Globe One Connection at a Time**

Through information technology, the Internet, increased reliability, and speed of shipping, small companies have more access than ever before to the tools they need to compete globally. What does this mean for the wine industry and what lessons can be learned from FedEx, one of the leaders in technology?

**Key Note Speaker** Richard Maranville, Sr. Vice President, CIO, Fed Ex Kinko's

### **As Power Shifts to the Consumer, Now What?**

For both lovers and marketers of wine, our world has changed. Armed with the power of the Internet, consumers are not only being heard, but they are now making and even moving markets. Join us as we explore this world of interactive marketing and new media. Learn from two savvy and cutting edge business leaders ways to leverage the disruption caused by these growing trends.

**Key Note Panel** Max Kalehoff, Vice President of Marketing, Nielsen BuzzMetrics  
Gary Vaynerchuk, Director of Operations, WineLibrary.com

**Technology Roadmap** Mack Schwing, Director Wine Business Program, Sonoma State University

**Event Overview** Lesley Berglund, WITS Event Co-Chair

**Transition Remarks** J. Smoke Wallin, WITS Event Co-Chair

## **Networking Break**

**10:30 – 10:45 a.m.**

**Trade Sales & Marketing (Track A)****Strategic Use of Sales Information and Best of Class Category Management Approaches**

The wine industry is experiencing some of the same pressures as general consumer products manufacturers that are in a battle for their brands. Private label is escalating in the wine and spirits business, categories are more confused and harder to manage, and increasingly, retailers have more shopper insight data than the producer. Brand companies must redefine processes quickly to better serve the shopper at the shelf. However, this requires a major change of front office processes and technologies, and for the wine industry a change in thinking and maybe even people.

This panel will explore some of the successful approaches wineries and other brand companies are using to be smarter when it comes to sales data and dealing with the trade effectively. The discussion will drill into modern approaches to category management and how one doesn't have to be the big "category captain" to use these techniques and analysis to better your brands' competitive position on the shelf, on display and on feature/promotion. Best of class approaches to this topic that cross all consumer products manufacturers will be discussed. The focus will be on how companies are effectively using information to position their brands vis a vis their competitors and the trade.

Moderator: Smoke Wallin, CEO Taliera Holdings, Chairman & Founder, eSkye Solutions

Speakers: George Louis, Regional Sales, Caymus  
Danny Brager, VP Client Services, The Nielsen Company  
Sasha Kadey, Sales Analyst, King Estate  
David Fischer, Director Sales & Marketing, Ramey Wine Cellars

**Consumer Direct Sales & Marketing (Track B)****The Five Habits of Successful Wineries**

Wineries with successful direct-to-consumer marketing and sales programs share several "habits." Vintners will present the tips and tricks they use that you can deploy today, with minimal or no cost, to improve data collection and analysis, to set metrics and standards, and to enhance the entire online and offline brand experience.

Moderator: Jeremy Benson, President, Benson Marketing

Speakers: Deborah Baldwin, Proprietor, Justin Vineyards & Winery  
Bill Murphy, CEO/President, Clos LaChance Winery  
Lesley K. Russell, VP, Direct Marketing & Sales, St. Supery Vineyards & winery

**General Management (Track C)****Tips for Successful Technology Project Management**

Regardless of whether you're managing internal projects or vendors implementing their software into your business, technology projects have incredibly high failure rates and low satisfaction. In this session, learn what sets a technology implementation project up for success before you even start. Real examples - both successes as well as failures - will be used along with the resulting best practices and methodologies that have been developed as a result.

Moderator: Jack Clare, VP, IT, Constellation Wines US

Speakers: Paul Broderick, VP IT and Business Processes, Fosters Wine Estates Americas  
Lynne Taylor, Owner, Wine Country Accounting & Finance Consultants  
**Michelle Ausburn, Manager, Moss Adams LLP**

**Vineyard & Winery Operations (Track D)****Advances in Wine Production Tools**

Winemakers and other expert users discuss what cellar management software does, how it can streamline operations and how to find the right system that works for your winery.

Moderator: Alison Crowe, Winemaker, Plata Wine Partners

Speakers: Rose Dadian, Production Compliance Specialist, The Wine Group  
Molly Hill, Associate Winemaker, Sequoia Grove Winery  
Steve Kirby, Senior Winemaker, Sonoma Wine Company  
Steve Urberg, Associate Winemaker, Gloria Ferrer

## **Winery CIO Forum Lunch**

**12 Noon – 1:15 p.m.**

## **Breakout Session Two**

**1:15 – 2:30 p.m.**

### **Trade Sales & Marketing (Track A)**

#### **Cutting Edge Retailer Models**

Recently a number of companies have used technology to carve out unique positions to create a new, vital range of choices for wine consumers of all types. They are using content and customer driven service menus to create communities that are not defined by zip codes but rather by learning and common interests. These companies bridge the traditional, personal local retail and the selection-based or club-based consumer direct models that first populated the on-line environment by engaging their customers in a deeper relationship and finding ways to integrate their business into their customers' everyday choices and learning through technology. Just as the businesses that drove the blurring between retail and foodservice a decade ago helped the best food companies create innovative products and services, we believe this group of leading businesses can be a force for innovation among top wine suppliers.

Moderator: Greg Christoff, President, WTN Services -The WineTasting Network

Speakers: Bryan Dougherty CEO, My Wines Direct  
Cornelius Geary CEO/Co-Founder of RadCru Inc.  
Alyssa Rapp Co-Founder & CEO, Bottlenotes  
Gary Vaynerchuk, Director of Operations, Winelibrary.com

### **Consumer Direct Sales & Marketing (Track B)**

#### **Consumer Direct Compliance A-Z**

Compliance A-Z (or... the road to hell is paved with good intentions). We direct marketers know the importance of getting the right offer to the right customer, but it doesn't end there for wine marketers. We must also incorporate critical compliance check points to be successful. From offer inception through customer delivery, there are many compliance pitfalls and traps along the way. Hear from those who have successfully navigated the compliance path and have built incredible consumer direct wine programs.

Moderator: Tammy Boatright, VP, Sales & Marketing, Wattle Creek Winery

Speakers: Brian Baker, Vice President, CRM, Jackson Family Wines  
Thomas Blackwood, Wine Club Headquarters Manager, Beam Wine Estates  
Patti Sevigny, Wine Club Manager, Artesa Winery

### **General Management (Track C)**

#### **ROI of Passion: Using Technology to Communicate and Motivate for Optimum Performance**

Explore a variety of systems that can help build great organizations. Learn how to educate, communicate and motivate through technology for optimum performance. How to communicate clear performance goals and objectives and assess key skill sets as critical performance indicators. And finally how to compensate accordingly with real time management reporting by activity based costing/net performance incentives that increase net income

Moderator: Linda Yenni, Partner, Wine Realty International

Speakers: Barbara McPherson, Murray River Training  
Paul Hicks, VP, Payroll Masters  
Sean Dunn, Partner, Groove 11

### **Vineyard & Winery Operations (Track D)**

#### **Latest Trends in Vineyard Management Systems**

From planting to irrigation to pruning, experts will talk about how new technology is helping industry professionals make better decisions in the vineyard.

Moderator: Cyril Penn, Editor, Wine Business Communication

Speakers: Bryan Osborn, Diageo Chateau & Estates  
Steve McIntyre, President, Monterey Pacific, Inc.  
Daniel Roberts, Ph.D., Integrated Winegrowing  
Dr. Robert Wample, Chair, Dept. of Viticulture & Enology, CSU Fresno

## **Networking Break**

**2:30- 2:45 p.m.**

## **Breakout Session Three**

**2:45- 4:00 p.m.**

### **Trade Sales & Marketing (Track A)**

#### **New Developments in Supply Chain Technologies & Strategies**

Amidst a tremendous amount of industry consolidation, remaining competitive in the three tier environment requires a complete understanding of the supply chain from supplier, to wholesaler to retail distribution. Learn how one of the top wholesalers in the ABI industry has leveraged innovations in supply chain and business process to be successful.

Moderator: Mike Adams, CIO, Glazers Family of Companies

Speaker: Gregg Mitchell, Sr. VP, Supply Chain & Logistics, Glazers Family of companies

### **Consumer Direct Sales & Marketing (Track B)**

#### **Understanding & Maximizing Wine 2.0**

Catapult your brand into new wine consuming communities and build your database. Social networking, wikis, blogs, online user-generated content – the crux of Web 2.0 – provides a new paradigm where the consumer is king and their opinion (novice or expert) generates sales. We are a recommendation-driven industry and this new sphere enriches the online experience, broadens consumer access to products, and ultimately expands the winery direct channel. This panel will give insight into companies, trends, and opportunities.

Moderator: Andrea Johnston, VP Business Development, Inertia Beverage

Speakers: Josh Hersmeyer, President Capozzi Winery, Founder, Pinotblogger.com

John Hingley, Founder & CEO, Andiamo Systems, Inc.

Philip James, Founder, Snooth.com

Tom Wark, Founder, Wark Communications

### **General Management (Track C)**

#### **Meeting Compliance Challenges Head-ON**

Compliance can be a very encompassing and confusing topic – especially for the Wine Industry. From Sarbanes-Oxley to Bioterrorism to TTB Audit requirements, it's enough to keep you up at night. This panel will address a number of the Compliance issues that Wineries currently face today and ask the Winery representatives to explain how they are currently dealing with them.

Moderator: Bob Barnes, CIO, F. Korbel & Bros., Inc

Speakers: Jeannie Bremer, Nixon Peabody

Kathy Cochran, Sales & Distribution, Cline Cellars

Lisa Russell, Corporate Wine Quality Manager, F. Korbel & Bros., Inc

Barb Laverdi, VP, Associate General Counsel, Constellation Brands., Inc.

### **Vineyard & Winery Operations (Track D)**

#### **Barrel Management Identity Crisis**

The annual acquisition of barrels comprises a considerable financial cost for any size winemaking operation. Knowing and managing the content and movement of groups, subgroups, and individual barrels presents a challenge. Bar coding, radio frequency identity tags, and the use of wine industry specific software systems offer opportunity to understand the complexity of the cellar in real time as well as comply with the bio-terrorism regulations. This panel will explore the various dimensions and systems in controlling and maximizing the return on this investment.

Moderator: Lisa Levsen Corbett, President, Modular Information Systems

Speakers: Mike Blom, Owner, Napa Barrel Care

Michael Dever, Finance & Production Systems Analyst, Chateau St. Michelle

Joe Shirley, Winemaker, Trinchero Family Estates

## **Wine Reception & Technology Showcase**

**3:00 – 6:30 p.m.**