



**4th Annual Wine Industry Technology Symposium
July 14 & 15, 2008
Napa Valley Marriott**

Monday, July 14th

3:30 – 5:30pm

CIO ROUNDTABLE- ALL THREE TIERS

This round table is an exclusive session for winery, distributor & retailer technology leadership to discuss hot topics between the tiers; CIO Organizers: Bob Barnes (CIO, F. Korbel & Bros.) & Jack Irby (Director of Information Systems, Folio Wine Partners); Facilitator: Lesley Berglund (WITS Co-Chair).

5:30 – 6:30pm

WINE RECEPTION & TECHNOLOGY SHOWCASE (Sponsor Exhibitors)

5:30 – 6:30pm

WELCOME WINE RECEPTION & TECHNOLOGY SHOWCASE

6:30 – 8:30pm

VIP DINNER

Tuesday, July 15th

7:30 – 8:30am

REGISTRATION & CONTINENTAL BREAKFAST

8:30 - 10:30am

GENERAL SESSION

1. **Welcoming Remarks.** Lesley Berglund & Smoke Wallin, WITS Co-Chairs
2. **Keynote Speaker: Innovations & Change in the Global Supply Chain.**
Our first session explores advances in supply chain leadership, led by category expert Ben Gordon. Ben is Managing Director of BG Strategic Advisors, a leading firm providing supply chain companies with CEO-level advisory services in the areas of strategy, technology and finance.
3. **Keynote Speaker: Breaking Through to On-Premise Customers.** Can e-mail really drive wine sales for full service restaurants? On-premise customers respond with resounding YES. Guest speaker Scott Shaw, founder of Fishbowl, a leader in online marketing for restaurants, with over 28,000 restaurants and a cumulative opt-in database of over 25 million consumers, will share successful case studies and explore how wineries and

distributors can leverage this rapidly growing medium to help grow their own sales.

4. **Keynote Panel: CIO & CEO Group Therapy . . . what CIOs say & what management hears (and visa versa).** What CIOs say and what management hears (and visa versa). Can we ever speak the same language? Moderator Jack Irby (Director of Information Systems, Folio Wine Partners); Panelists: Headsets.com CEO Mike Faith & CIO Nick White, WTN Services GM Chris Edwards & CIO Rich Minns and Constellation. Sr. VP & CIO, Harish Ramani.
5. **Transition Remarks.** Lesley Berglund & Smoke Wallin, WITS Co-Chairs

10:30- 10:45 a.m. **NETWORKING BREAK**

10:45 – Noon **BREAKOUT SESSION I**

A. Technology Leadership: Exploring the Spectrum of Technology Outsourcing Strategies. [Everyone] Understanding pros & cons along the continuum . . . from ASP, to software as a service to full outsourcing solutions. Moderator: Mike Deverell (Retired Partner, Deloitte Consulting); Panelists: Dan McGrath (Western Region Manager, Systime) and more.

B. Consumer Direct Sales: Keeping it Safe & Legal . . . Latest Tools & Trends in Consumer Direct Compliance. [Everyone] A look beyond DTC shipping, challenges include PCI security compliance and more; Moderator: Jeff Carrol (Sr. Prod. Manager, Ship Compliant); Panelists: Rachel Matteo-Boehm (Partner, HRO Law), Terry Ramos (Director, Strategic Alliances, Qualys) and more.

C. Trade Sales & Marketing: Supply Chain Thought Leadership in Action. [Advanced] Explore more of the advances introduced during our general session. Moderator: Ben Gordon (Managing Director, BG Advisors); Panelists: Alan C. Thomas (Sr. Manager, Food & Beverage Practice, Deloitte Consulting), Carol Thompson (COO, NVL), Dean Frew (President & CEO, Xterprise) and Duane Williams (Project Leader, Boston Consulting Group).

D. Grape Management: From Contract to Crush Pad. [Everyone] With more and more data systems available, this session will review some of the best technology practices in grape management. Moderator: Bryan Osborn (President, Cropwire); Panelists: Maggie Huffman (Director of Production Systems, Foster's Wine Estates America) and Bruce Phillips (Director of IT Business Strategy, Constellation Brands), and Herbert Klein, Industry Lead Consumer Products, Oracle.

2:00 – 1:15pm **NETWORKING LUNCH**

12:00 – 2:15pm **TECHNOLOGY SHOWCASE (All Exhibitors)**

2:15 – 3:30pm **BREAKOUT SESSION II**

A. Technology Leadership: Going Green in IT. [Advanced] The wine industry is proud to be leaders in sustainability and every department does its share. Explore the best in green technology solutions. Moderator Bob Barnes (CIO, F. Korbel & Bros.); Panelists: Jack Clare (VP Information Technology, Constellation Brands); David Beck (IT Manager, F. Korbel & Bros.) and Frank Wilhelm (IT, Wente).

B. Consumer Direct Sales: Strength in Numbers. [Everyone] Using metrics to drive direct sales programs and manage successful consumer direct organizations. Moderator: Mack Schwing (Co-founder, WISE Academy); Panelists: Jeremy Benson (President, Benson Marketing Group), Matt Wood (VP Retail Operations, Icon Estates) and Dan Michael (Marketing Director – Consumer Direct Sales, E & J Gallo).

C. Trade Sales & Marketing: Successful Strategies for Two-Tier (Direct-to-Trade) Sales. [Everyone] Helpful tools for wineries who sell directly to retailers & restaurants. Moderator: Andrea Johnston (VP, Channel Development, Inertia Beverage Group); Panelists: Peter Granoff (Partner, Ferry Plaza / Oxbow Wine Merchant), Kenneth Rochford (General Manager, Medlock-Ames Winery) and Cristin Castro (Founder, Impressa).

D. Vineyard & Winery: Blend Management: From Scale House to Warehouse. [Advanced] Exploring new tools and best practices in blend management. Moderator: Paul Ahvenanian (Director of Winemaking, F. Korbel & Bros.); Panelists: Brian Smith (President, Vinovation), Michael McNeill (Director of Winemaking, Hanzell Vineyards), Maggie Huffman (Director of Production Systems, Foster's Wine Estates America).

3:30 – 3:45pm

NETWORKING BREAK

3:45 – 5:00pm

BREAKOUT SESSION III

A. Technology Leadership: Creating a Successful Program Management Office. [Everyone] Event the most exciting technology projects are only as good as their implementation. An in-depth look how a successful PMO works. Moderator: John Lynch (Program Management Officer, Foster's Wine Estates Americas); Greg Binon (Project Management Consultant).

B. Consumer Direct Sales: Wine 2.0, The Results Show. [Advanced] We have heard all the hype. Now what have we learned? What really works? Come join the next generation of online marketers for a lively discussion. Moderator: Joel Vincent (Executive Director, Open Wine Consortium); Panelists: Jill Bernheimer (Owner, Domaine547.com), Josh Hermsmeyer (Owner, Capozzi Winery & Pinotblogger.com), Jeff Stai (Twisted Oak Winery) and Tim Elliot (WineCast.com).

C. Trade Sales & Marketing: Selling to National Accounts 101. [Everyone] For wineries just getting started, or considering selling to chains for the first time, don't miss this session! Moderator: J. Smoke Wallin (CEO, Taliera

Holdings); Panelists: Brian Lechner (Client Service Director, The Nielsen Company), Duane Williams (Project Leader, Boston Consulting Group) and more.

D. Vineyard & Winery: Green Tech Advances in the Vineyard. [Everyone]

Explore some of the best green vineyard practices based on technology solutions. Nick Frey (President, Sonoma County Wine Grape Commission), Pam Mitchell (General Manager, SureHarvest) and Julie Nord (Owner, Nord Coast Vineyards).

5:00 – 6:30pm

WINE RECEPTION & TECHNOLOGY SHOWCASE (All Exhibitors)

Note: Program subject to change