



**7th Annual Wine Industry Technology Symposium**  
**July 12 & 13, 2011**  
**Napa Valley Marriott**

**AGENDA**

**Tuesday, July 12th**

- 9:00am - 2:00pm TRADE SHOW CHECK-IN AND BOOTH SET-UP
- 1:00 - 2:30pm DAY 1 REGISTRATION
- 1:00 - 2:30pm TECHNOLOGY SHOWCASE OPENS (tradeshow)
- 2:30 - 3:45pm WORKSHOP SESSION #1  
The following 4 workshops will be presented twice depending on attendance.

**A. Social Media: Management & Measurement Strategies to Grow Your Fan Base & Engage your Fans**

Michael Brito, VP Digital with Edelman and @britopian, will provide a crash course in today's best practices and tools to manage your social media program. He will share how to provide relevant, timely content to your community to convert them to brand advocates and insights on importance of monitoring and measuring and how to overcome the tedious task. Hear case studies from two wineries who have implemented new means for tracking and measuring their social media efforts, including their key learnings and how they've since adapted their efforts to get more consumer engagement and results from their efforts.

**Moderator:** April Damron, Founder, Damron Marketing  
**Panelists:** Michael Brito, VP Social Media, Edelman Digital  
Nat Komes, General Manager, Flora Springs Winery & Vineyards  
Jessica LaBounty, Senior Marketing Manager, Benziger Winery

**B. Free and Low Cost Technologies for Wineries**

Is it really possible to run your business or winery without endless software licenses fees and support agreements? It can be. We'll take a look at some of the options for office productivity, graphics, building websites, project management, social media and even e-commerce. We'll also talk about what you can't afford to use for free.

**Moderator:** James Marshall Berry, Owner, JMB Web Consulting  
**Panelist:** Andrew Healy, Social Media Director, Vino Cartel

**C. Business Intelligence - Best Practices**

Real Stories and Options for Wineries of All Sizes to Intelligently Use Information. What is business intelligence and how does the decision process work?

**Moderator:** Heather Crawford, Director of IT, Amy's Kitchen  
**Panelists:** Morten Middelfart, PhD, CTO, TARGIT US, INC.  
Chris Dillon, Information Systems Manager, Opus One  
Neal Cram, Business Analyst, Don Sebastiani & Sons

**D. Composite Business Process and Change Management - A Kiss and Make-Up Session for Both IT and the Business Area**

Do you have a business project or an IT project? How can you tell the difference? What are the benefits of the former and the warning signs you might have the latter? One way or another all technology projects need to have one goal in mind - selling more wine, to more customers, more often. This fast-paced and thought-provoking seminar discusses various tools needed to help rethink the way business processes should be viewed, and how to ensure best alignment for future success of both business and IT.

**Moderator:** Rob Celsi, VP Corporate Services, Trinchero Family Estates  
**Panelists:** Adrienne Keeble Petersen, Consumer Goods Human Capital, Deloitte Consulting  
Don MacKenzie, Industry Solution Principal, itelligence USA  
Kathryn Brandt, Industry Solution Principal, itelligence USA  
Melinda McAuliff, Communications Lead, Constellation Brands

4:00 - 5:15pm WORKSHOP SESSION # 2

**A. How to Monitor Social Media - General Trends**

**Moderator:** April Damron, Founder, Damron Marketing

**B. Free and Low Cost Technologies for Wineries**

**Moderator:** James Marshall Berry, JMB Web Consulting

**C. Business Intelligence - Best Practices**

**Moderator:** Heather Crawford, Director of IT, Amy's Kitchen

## D. Change Management and Composite Business Process

Moderator: Rob Celsi, VP Corporate Services, Trincherro Family Estates

5:15 - 6:30pm WELCOME WINE RECEPTION & TECHNOLOGY SHOWCASE

6:30 - 8:30pm VIP CIO NETWORKING DINNER - Napa Marriott  
Wines Sponsored by Aged Cabernet Trust

8:30 - 10:00pm PORT & DESSERT BAR NETWORKING EVENT

## Wednesday, July 13th

7:30 - 8:30am REGISTRATION & NETWORKING CONTINENTAL BREAKFAST

7:30 - 8:30am TECHNOLOGY SHOWCASE

8:30 - 11:30am GENERAL SESSION

### Welcoming Remarks

Lesley Berglund, WITS Co-Chair

### Keynote Address: "The Vision and Technology Behind Thirsty Girl"

*What is Thirsty Girl?* Thirsty Girl™ (TG) is a member-driven community that celebrates women. With glass, fork, and plane ticket in hand, Thirsty Girls live life to the fullest. Founded by Emmy award-winning television host, author, consultant and speaker, Leslie Sbrocco, the goal of Thirsty Girl is to bring women together over their shared passions of libations, food, and travel. As a nationally-recognized wine expert, Leslie has spent more than a decade in her dream job - getting paid to eat and drink around the world. On her journeys she discovered there thousands of Thirsty Girls who want to connect with others online and off about their interests; be it family, career, charity work or simply finding a great Chardonnay. Find out how Thirsty Girl grew quickly through a point-counter-point interplay of ideas put into action through the use of social media, content and live events.

Leslie Sbrocco, Head Thirsty Girl

Janet Fouts, Social Media Coach

### Keynote Panel: The FBI on Social Networking:

The Security Impacts and Human Resource Aspects of Social Networking: General overview of the FBI's Cyber Program (what it is and what they do), what your organization should do if you suspect a cyber intrusion, and some tips on social networking safety.

Moderator: Smoke Wallin, Chairman & Founder of Pelican Brands, WITS Co-Chr.

Panelist: Joy Mihara-Meer, Special Agent, Federal Bureau of Investigation  
Chris Hane, Sr. HR Representative, Varian Medical Systems

### Keynote Address: "Technology and Innovation"

Tim Bucher is a serial entrepreneur who has created several successful companies over the last 23 years, taking one of them public and selling four others for over \$1billion in cash. His expertise lies in consumer products and services with an eye for exceptional consumer-user experiences. Mr. Bucher may be the only person in history who has served in an executive role for Bill Gates at Microsoft, Steve Jobs at Apple, and Michael Dell at Dell, learning how those leaders innovate and expand businesses.

Tim Bucher, CEO, TastingRoom.com

11:45am - 1:00pm NETWORKING SEATED LUNCH

1:00 - 2:00pm TECHNOLOGY SHOWCASE

2:00 - 3:15pm BREAKOUT SESSIONS I

### Technology Leadership (Track A): Top Grading our Technology Talent Pool

How can the wine industry recruit, attract, and retain the technology talent we need? We are challenged geographically, financially and culturally. We have a talent pool challenge without compensation rewards like Silicon Valley. This breakout session will explore new aspects of hiring technology talent by using outside the industry experts to help us think through the next generation of technology.

Moderator: Colin G. Funk, CIO, the Wine Group

Panelists: Fred Philpott, Principal, The Stevensville Group  
Jason A. Kranz, Partner, Heidrick & Struggles  
Brenda Rogers, PHR, Principal, HR Strategies

### Consumer Direct Sales (Track B): Outbound Telemarketing - Managing for Success

Is outbound telemarketing right for your winery? And, if you've decided to pursue outbound telemarketing, is it better to create an in-house team or use an outside vendor? This session will provide the facts you need not only to make the right decision but to manage for success once the channel is in place. We'll cover key metrics, technology requirements, reporting, database management, staffing and training.

Moderator: Tammy Boatright, President, VingDirect

Panelist: Sonyia Grabski, Founder, DTCinsider  
Susan Cole, Director of Consumer Marketing, Pezzi King Vineyards  
Bryan Gray, Director of Marketing & Sales Manager, St. Supery  
Judd Wallenbrock, GM of Michel Schlumberger and Humanitas

**Trade Sales & Marketing (Track C): Three Tier Collaboration - What Can We All Do Better?** Representing all three tiers, this is a candid overview on how wineries, distributors, and retailers can collaborate better. Discussion will center on better information integration and the technical, operational and financial ramifications that result from embracing (or avoiding) standards.

Moderator: John Collins, CEO, Great Vines

Panelists: Michael Saitow, CIO Sales & Operations, MS Walker  
Ian Griffith, Director Beverage Media Group  
Tom Hatton, Strategic Account Executive, 1Sync  
Joe Gregg, VP, IT and Business Process, St. Michelle Wine Estates  
Stephen R. Arens, Director, Industry Engagement, GS1 US

**Vineyard Operations (Track D): The Benefits, Challenges and True Costs of Implementing Viticultural Software**

Implementing viticulture software provides many benefits but the journey is filled with challenges that can significantly impact its effectiveness and success. Hear from people that have implemented industry leading viticulture software, learn from their experiences, save yourself some headaches, and be able to set the right expectations within your own company. The panel will look at farming efficiencies and the quality benefits that the software has been able to provide.

Moderator: Shokie Lopez, Vice President, IT, Wente Family Estates

Panelists: Rob Sorenson, Senior Viticulturist, Wente Family Estates  
Sandy Henson, Vineyard Technical Manager, Jackson Family Wines  
Towle H. Merritt, Viticulturist, Walsh Vineyard Management  
Herbert Klein, Industry Lead-Consumer Products, Oracle

3:15 - 3:30pm NETWORKING BREAK

3:30 - 4:45pm BREAKOUT SESSIONS II

**Technology Leadership (Track A): Managing the Cloud**

Outsourcing Communications and Collaboration to the Cloud (MS BPOS)  
Outsourcing Data Center

First-hand case demonstration of utilizing the public cloud running high volume business application (MS Outlook) and outsourcing virtualized data center infrastructure and services. Focus on the tipping points in making the decision and business benefits and challenges involved. Panelists will also bring experience for smaller to midsize wineries in leveraging SAS for ERP and CRM applications.

Moderator: Greg Basara, IT Business Strategy, Constellation Brands

Panelists: Roy Hardgrove, VP Technical Svcs., Constellation Brands  
Aaron Bertram, Director Global Data Center, Constellation  
Oliver Then, Principal Sales Consultant, Oracle  
Dwight Moore, Global Industry Director, salesforce.com

**Emerging Trends in Direct-to-Consumer (Track B)**

What weren't we talking about two years ago? Join us for a discussion of the newest trends in DTC that is making it easier for wineries to attract & engage customers. QR Codes: With the increased adoption of smartphones by consumers, CPG companies are turning to QR (quick response) codes to engage consumers at POS, events, and on-premise environments. Online Reservations: It's easy to make reservations for everything from dinner to an island vacation. Are you making it easy for customers to book tours and tastings? Summer Shipping: Good news! Many shipping companies have heard our cries for help and have launched new programs to avoid heat exposure.

Moderator: Sonyia Grabski, Founder, DTCinsider

Panelists: Rick Breslin, Founder, Hello Vino  
Angelica de Vere, VP Direct to Consumer Marketing, Napa Destination Marketing Council  
Stacey Cootes, Direct Sales Manager, Delectus Winery

**Trade Sales & Marketing (Track C): iPad in the Wine Industry**

Stories from the Winery and Beyond

Please join us for an informative overview of iPad use throughout the world of wine as well as an in-depth look at how Jordan uses the iPad in their sales and winery operations.

Moderator: Heather Crawford, Director of IT, Amy's Kitchen

Panelists: Lisa Mattson, Director of Communications, Jordan Vineyard and Winery  
Cathy Huyghe, Founder, Red White Boston

**Winery Operations (Track D): Blend Management Systems**

Efficiencies and Benefits Gained from Winemaking Software

How wineries achieve 'value' through modern ERP and Grower/Blend systems

Moderator: Shokie Lopez, Vice President, IT, Wente Family Estates

Panelists: Colin Funk, CIO, The Wine Group  
Phil Bourke, Supply Transformation Manager, CI & Business Systems, Treasury Wine Estates  
Joel Schipper, Master Principal Solution Architect, Oracle

4:45 - 6:30pm WINE RECEPTION & TECHNOLOGY SHOWCASE

