



# O/V WINE MARKETING

## 2018 AGENDA

**UC DAVIS**  
**EXTENSION**  
**WINEMAKING**

# O/W WINE MARKETING 2018 AGENDA

To enroll in the full two-week program, enroll in section 181VIT200. You may also enroll by the week or by the day.

## WEEK 1: MARKET OVERVIEW AND BRAND ESTABLISHMENT

Enroll in section 181VIT201

### Monday, July 16

Enroll in section 181VIT203

#### INDUSTRY OVERVIEW

- 8:00 a.m. **Welcome coffee and continental breakfast**
- 8:30 **Welcome and Introduction**  
*Christian Miller, proprietor, Full Glass Research*
- 9:30 **The History of Wine in California**  
*Jim Lapsley, OIV course founder and UC Davis professor emeritus*
- 10:45 **BREAK**
- 11:00 **Definitions and Concepts of the U.S. Wine Industry**  
*Christian Miller, proprietor, Full Glass Research*
- 12:30 p.m. **LUNCH**
- 2:00 **Wine Geography of the United States**  
*Jim Lapsley, OIV course founder and UC Davis professor emeritus*
- 3:15 **BREAK**
- 3:30 **The Art of Storytelling**  
*Bruce Rector, founder, Ahh Winery*
- 5:15 **Wine Reception**  
*Christian Miller and UC Davis staff*

### Tuesday, July 17

Enroll in section 181VIT204

#### THE AMERICAN MARKET FOR WINE

- 8:30 a.m. **Greetings and Announcements**  
*Christian Miller*
- 8:45 **Sales Trends and the Data that Lies Below Them**  
*Christian Miller, proprietor, Full Glass Research*
- 10:30 **BREAK**
- 10:45 **State of the Industry**  
*Jon Moramarco, managing partner BW166*
- 12:00 p.m. **LUNCH**

1:30

#### Green Wines—The Organic and Sustainable Market

*Allison Jordan, executive director, California Sustainable Winegrowing Alliance*  
*Josh Prigge, founder and CEO, Sustridge*

3:00

#### BREAK

3:15

#### How PR is Marketing (and Vice Versa)

*Paul Wagner, founder and president, Balzac Communications & Marketing*

5:00

#### End

### Wednesday, July 18

Enroll in section 181VIT205

#### REGULATION, FINANCE AND CONTROLLING YOUR BRAND

- 8:30 a.m. **Greetings and Announcements, Introduction to the Legal Environment**  
*Christian Miller*
- 9:00 **Philosophies of Regulation: Who Can Sell Wine and How?**  
*John Trinidad and Bahaneh Hobel, attorneys, Dickenson, Peatman & Fogarty LLC*
- 10:45 **BREAK**
- 11:00 **A Banker Looks at the U.S. Wine Market**  
*Dan Aguilar, SVP NCA, Commercial Banking, Mechanics Bank*
- 12:15 p.m. **LUNCH**
- 1:30 **Licensing and Trade Practices**  
*Carrie Bonnington, partner, Pillsbury Winthrop Shaw Pittman LLP*
- 2:30 **Label and Packaging Issues**  
*Tracy Genesen, vice president & general counsel, Wine Institute*
- 3:30 **BREAK**
- 3:45 **Legal Aspects of Controlling Your Brand**  
*Robert Burlingame, attorney and founder, Amplitude IP*
- 5:30 **End**

## Thursday, July 19

Enroll in section 181VIT206

### GRAPE SUPPLY AND ECONOMICS OF PRODUCTION

- 8:30 a.m. **Greetings and Announcements**  
*Christian Miller*
- 8:45 **Selling Wine Grapes: Pricing and Contracts**  
*Glenn Proctor, Ciatti Company*
- 10:15 **Costs & Considerations: Establishing a Winery vs. Custom Crush**  
*Melissa Bates, winemaker, Joel Gott Wines*
- 11:15 **BREAK**
- 11:30 **Négociants**  
*Melissa Bates, winemaker, Joel Gott Wines*
- 12:30 p.m. **LUNCH**
- 1:30 **Basic Wine Accounting**  
*Craig Underhill, CPA/CPSM, Brotemarkle, Davis and Co., LLP*
- 2:45 **The Bulk Wine Market**  
*Marc Cuneo, partner, Turrentine Brokerage*
- 3:45 **BREAK**
- 4:00 **Presentation by UC Davis Department of Viticulture & Enology**
- 5:15 **End**

## Friday, July 20

Enroll in section 181VIT207

### BRAND ESTABLISHMENT

- 8:30 a.m. **Announcements, Questions and Answers**  
*Christian Miller*
- 9:00 **The Care and Feeding of the Press**  
*Tim McDonald, CSW, managing director, Wine Spoken Here*
- 10:15 **BREAK**
- 10:30 **The Role of the Wine Critic**  
*Dan Berger, wine columnist and proprietor, Vintage Experiences*
- 11:30 **LUNCH**
- 12:45 p.m. **Launching a New Brand**  
*Lisa Ehrlich, proprietor, Lisa Ehrlich Consulting*
- 2:00 **Store Brands and Private Labels**  
*Alison Crowe MBA, director of winemaking, Plata Wine Partners LLC*

- 3:00 **BREAK**
- 3:15 **Package Design**
- 5:30 **End**

## WEEK 2: DISTRIBUTION AND SALES

Enroll in section 181VIT202

## Monday, July 23

Enroll in section 181VIT208

### BRAND MANAGEMENT

- 8:30 a.m. **Greetings and Announcements**  
*Christian Miller*
- 9:00 **Success by the Numbers: Fact-Based Marketing**  
*John Collins, CEO, GreatVines - Beverage Selling Solutions*  
*Christian Miller, proprietor, Full Glass Research*
- 10:15 **BREAK**
- 10:30 **Digital Marketing**  
*Jenna Buhagiar, vice president, Fleishman Hillard*
- 12:00 p.m. **LUNCH**
- 1:15 **American Wine Consumers**  
*Christian Miller, proprietor, Full Glass Research*
- 2:30 **Managing a Portfolio of Brands**  
*Belinda Weber, Digital Trade & Consumer Marketing director, Duckhorn Wine Company*

- 3:30 **BREAK**
- 3:45 **Tasting: Matching Wine Style to Positioning, Personality and Price**  
*Kay Malaske, Trade Relations & Education manager, Duckhorn Wine Company*
- 5:30 **End**

## Tuesday, July 24

Enroll in section 181VIT209

### CHANNELS OF DISTRIBUTION

- 8:30 a.m. **Greetings and Announcements**  
*Christian Miller*
- 9:00 **Chemistry of Wine Sales & Pricing**  
*Jim Cahill, general manager domestic operations, Rutherford Wine Company*
- 10:00 **Working with the Big Distributor**  
*Matt Hagel, SVP National Accounts – Off Premise, Young's Market*
- 11:00 **BREAK**

- 11:15 **Distributing Ultra Premiums**  
*Bruno Walker, director of Business Development, Grape Expectations*
- 12:15 p.m. **LUNCH**
- 1:30 **Fine Wine Sales Management and Techniques**  
*Sean Diggins, Western Division manager, Banville Wine Merchants*
- 3:00 **BREAK**
- 3:15 **The Role of the Importer**  
*Brian Greenwood, partner, Wine Wise*
- 5:30 **End**

## Wednesday, July 25

Enroll in section 181VIT210

### RETAIL SALES

- 8:30 a.m. **Greetings and Announcements**  
*Christian Miller*
- 8:45 **The Fine Wine Shop**  
*Jason Lefler, buyer, Solano Cellars*
- 9:45 **Chain Retail and National Sales**  
*Susan Winchester, national sales consultant, Green Glass Global - Beverage Brokers*
- 11:00 **BREAK**
- 11:15 **The Tasting Room**  
*Craig Root, president, Visitor Management Resources*
- 12:30 p.m. **LUNCH**
- 1:30 **Wine Sales: The Electronic Interface**  
*Elaine Marshall, proprietor, Marshall Wine Company*
- 2:45 **BREAK**
- 3:00 **The Grocery and Mass Market Channels**  
*Brian Tognotti, client director, The Nielsen Company*
- 4:15 **On-Premise: Restaurants and More**  
*Traci Dutton, beverage manager/sommelier, Culinary Institute of America*  
*Marian Jansen op de Haar, principal, Vines 57/Estate Ambassador Acumen Wine*
- 5:00 **Presentation Workshop**
- 5:30 **End**

## Thursday, July 26

Enroll in section 181VIT211

### WINERY PROFILES

- 8:30 a.m. **Greetings and Announcements**  
*Christian Miller*
- 9:00 **Case Study: The Small Regional Winery**  
*Stuart Spencer, proprietor, St. Amant Winery*
- 10:00 **BREAK**
- 10:15 **Case Study: Launching a New Brand at the High End**  
*Bill Leigon, president, Jamieson Ranch Vineyards & Winery*
- 11:30 **Q & A and Review**  
*Christian Miller*
- 12:00 p.m. **LUNCH**
- 1:30 **Case Study: The Large Winery**  
*Jennifer Wall, winemaker, Barefoot Cellars*
- 3:00 **BREAK**
- 3:15 **Case Study: Managing an Ultra-Premium Winery**  
*Russ Joy, VP California Operations, Ste. Michelle Wine Estates*
- 5:00 **End**

## Friday, July 27

Enroll in section 181VIT213

### FINAL THOUGHTS

- 8:30 a.m. **Greetings and Announcements**  
*Christian Miller*
- 9:00 **Sensory Research and the Consumer**  
*Rebecca Bleibaum, president, DragonflySCI*
- 10:30 **BREAK**
- 10:45 **Taste and Sensibility: Who do You Want to Drink Your Wine?**  
*Tim Hanni MW, author*
- 12:30 p.m. **Final Announcements and Last Chance for Questions**  
*Christian Miller*
- 1:30 p.m. **Thank You and Goodbye!**  
*Christian Miller and UC Davis staff*