

Next Gen: A Case Study in Passing the Baton

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Introductions

- ◉ Name
- ◉ Winery
- ◉ Role
- ◉ Goal for this class?

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Business

- ◉ Vision
 - Why
- ◉ Execution
 - What /How
- ◉ Responsibilities
 - Who
- ◉ Measurements
 - How Well
- ◉ Communication
 - Who/What/When/Why/How

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Rate Your Winery

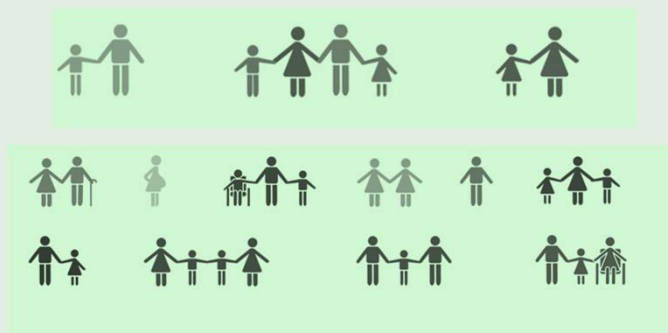
Areas	Clarity Scale 1-5 1 = Unclear 5 = Crystal Clear
Vision - <i>Why</i>	
Execution – <i>What/How</i>	
Responsibilities - <i>Who</i>	
Measurements – <i>How well</i>	
Communication - <i>Who/What/When/Why/How</i>	

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Viader 2007

Areas	Clarity Scale 1-5 1 = Unclear 5 = Crystal Clear		
	Delia	Alan	Janet
Vision - <i>Why</i>	5	5	2
Execution – <i>What/How</i>	3	4	3
Responsibilities - <i>Who</i>	3	3	4
Measurements – <i>How well</i>	2	2	2
Communication - <i>Who/What/When/Why/How</i>	2	3	3

What's different?



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Family Questions

- Why do we exist?
- How do we behave? What do we do?
- Who does what?
- How do we measure success?
- What did you mean by that?

Disagreement: What's most important right now?

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Tools

Why do we exist?

WHY – Simon Sinek on TED.com

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BD
BROTEMARKE,
DAVIS & CO. LP
Putting People First

	\$ FINANCIAL	CUSTOMERS	OPERATIONS	PEOPLE	END in MIND
Strengths					
Weaknesses					
Ideal Outcome					START WITH WHY

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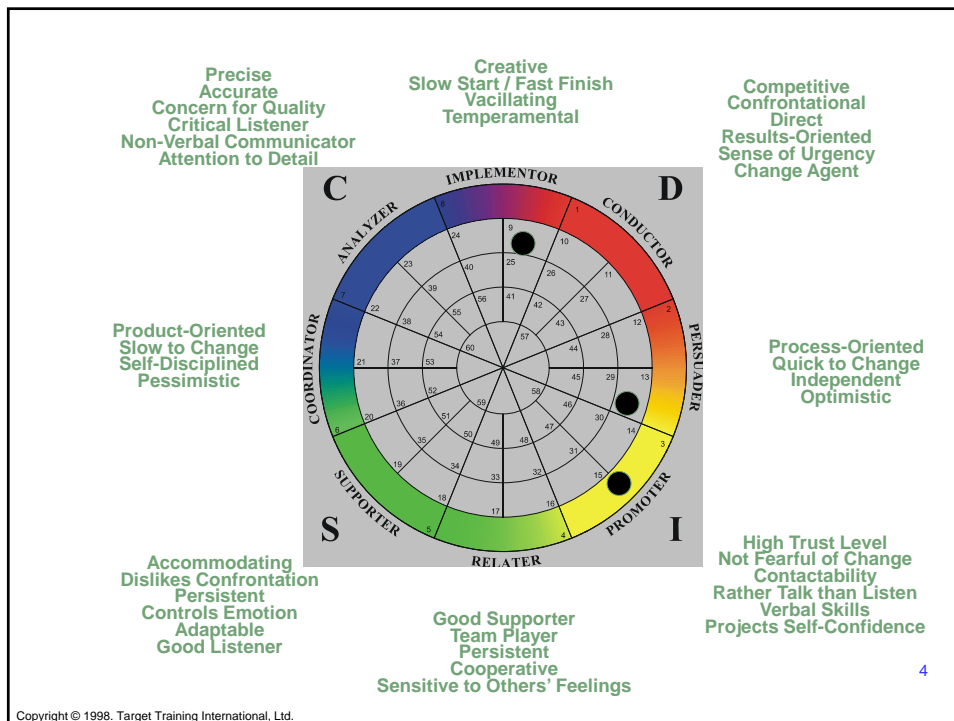


Tools

How do we behave?

Behavioral Styles, DISC training,
organizational behaviors

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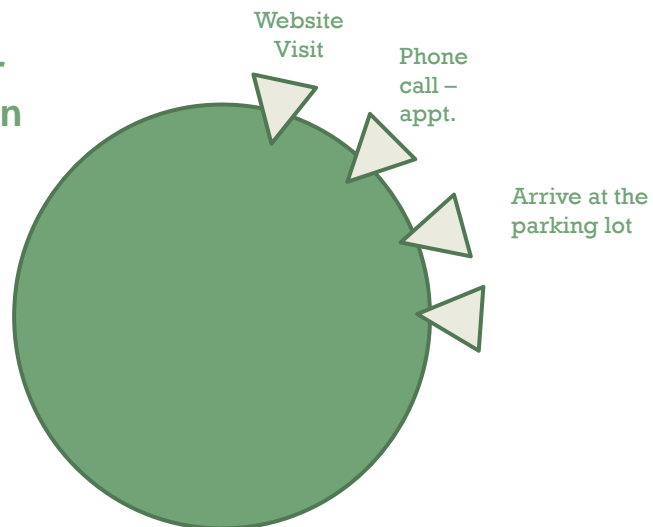
Tools

What do we do?

Process Map, Cycle of customer interaction

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Cycle of Customer Interaction



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Tools

How do we measure success?

Critical success factors

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Financial and Non-financial measures

● # Visitors – conversion rate

● Facilities Score

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1 MY FAMILY VINEYARDS		C		D		E		F		G		H		I	
2 FLASH REPORT															
3 For the year ending December 31, 2007															
4															
5															
6															
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36															
Key Performance Indicators				JANUARY			FEBRUARY								
		Act	Target	% of	Act	Target	% of	Act							
Finance															
Collection Days			45	0%			0%	-							
Marketing and Sales															
Number of visitors		100	100	100%	100	100	100%	300							
KPI name - for this CSF put here 2		-	2	0%	-		0%	-							
KPI name - for this CSF put here 3		-	3%	0%	0%		0%	0%							
KPI name - for this CSF put here 4		-		0%	-		0%	-							
KPI name - for this CSF put here 5		-		0%	-		0%	-							
Customers															
KPI name - for this CSF put here 1		-		0%	-		0%	-							
KPI name - for this CSF put here 2		-		0%	-		0%	-							
KPI name - for this CSF put here 3		-		0%	-		0%	-							
KPI name - for this CSF put here 4		-		0%	-		0%	-							
Vineyards															
KPI name - for this CSF put here 1		-		0%	-		0%	-							
KPI name - for this CSF put here 2				0%			0%	-							
KPI name - for this CSF put here 3				0%			0%	-							
Cellar															
KPI name - for this CSF put here 1				0%			0%	-							
KPI name - for this CSF put here 2				0%			0%	-							
KPI name - for this CSF put here 3				0%			0%	-							

Tools

Who does what

Performance calendar

MY SUCCESSFUL WINERY									
Sample CALENDAR FOR PERFORMANCE MANAGEMENT STRATEGIES									
<i>Enter planned activities for the year. Monthly, color code the cells to indicate completion.</i>									
Description	Responsible	Completed	2016						
			Jan	Feb	Mar	Apr	May	Jun	Jul
Distributor phone calls	Sales & Marketing Team								
Make 1 per day to prospects, 1 per day to current customers	Sam		X	X	X	X	X	X	X
Events									
Winemaker dinner	Bill			X					x
Winery visits for VIP distributors - Premier Napa Valley	Sally								
Napa Valley pours for Limo drivers									

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Tools

What did you mean by that?


Financial fluency training

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Three Goals = Three Statements

1. To sell our wine for more than it costs us to produce it.
Income Statement
2. To get a return on our investment.
Balance Sheet
3. To maintain a healthy cash flow to keep the company running.
Cash Statement

Financial Statements



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Tools

What is most important right now?

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FOCUS GRID
Re-prioritize your issues based on urgency and ease of implementation.

	Simple	Complex
Urgent		
Not Urgent		

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Viader 2016

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Vision - <i>Why</i>	5 5	5 5	5 2
Execution – <i>What/How</i>	5 3	5 4	4 3
Responsibilities - <i>Who</i>	5 3	4 3	5 4
Measurements – <i>How well</i>	5 2	4 2	4 2
Communication - <i>Who/What/When/Why/How</i>	5 2	4 3	4 3

Business today?

- ◎ 95% DTC
- ◎ Management meetings
- ◎ Performance calendar
- ◎ Projections that we meet
- ◎ Budgets for 2016
- ◎ All staff meetings –structured

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What stood out for you?

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Thank you

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