



Putting People First

Dear Napa Valley Vintners,

You are invited to join us in our seventh year of classes at the **Napa Valley Winery Education Center**. We are proud to join forces with the Napa Valley Vintners Association and Silicon Valley Bank in offering this unique training opportunity.

This year, money and time are both tight making it more important than ever to have good information shared with motivated teams who are producing measurable results. That's why we have created a special streamlined Jump Start class to provide winery owners with the essential information they need to re-energize their operations. Offered over a period of 2 months, this class includes 4 courses lasting just 2 hours each.

By sharing hands-on techniques and proven processes, we will help classroom participants clarify priorities, develop strategies, design measurements, and build a dashboard. And we'll do it in a fun and entertaining way.

Here's what one participant had to say:

"The training was a breath of fresh air. It guided us in clarifying our vision and developing a strategy to get there. But, unlike many such courses, Craig also provided us with hands-on experience and very user friendly tools to implement change in our business practices. His considerable knowledge of the wine industry, his comfortable manner and the excellent course materials make this a good value for both new and existing wine businesses."

Tom Clark and Laurie Claudon of Clark-Claudon Vineyards

We've enclosed additional details about the course and pricing. Be sure to consider adding the 9-month mentoring program to gain additional support at a substantial discount.

Register today by completing the enclosed form or by calling Jan at 963-4466. If you have any questions please call me.

I look forward to meeting you.

Sincerely,

Craig A. Underhill, CPA, CSPM
Partner



Napa Valley Winery Education Center 2010 Offering

Jump Starting your Organization

Right-sized training for busy executives who want to lead their teams to success.

Designed for busy executives who want to get a better handle on their organization and its financial drivers, this course delivers tools you can immediately apply to your business.

In this four-part course, we'll work with owners to help them narrow their focus, refine and execute strategies, create interim measures, and build an activity dashboard. Each 2-hour class includes hands-on activities, case studies, group discussion, and homework assignments designed to get you thinking.

Owners who complete these courses will be considered alumni who qualify for special pricing on facilitated mentoring and additional training.

Topics covered include:

- Identifying Opportunities (class 1)
 - a. Prioritize Urgency (homework)
- Developing Strategies (class 2)
 - a. Hands-on activity to develop useful strategies
 - b. Create and fine tune strategies (homework)
 - c. Establish timeline for implementation (homework)
- Measuring Results (class 3)
 - a. Learn how to create specific measurable performance indicators
 - b. Identify specific indicators (homework)
- Creating Accountability (class 4)
 - a. Establish calendar of activities needed to execute strategies
 - b. Build an activity dashboard



Pricing

Offering	Non-member price	Napa Valley Vintners Association member price
Jump Starting Your Organization – series of 4 courses for winery owners	\$1,500	\$0
9 months of trainee mentoring – monthly one on one meeting with facilitator	\$3,500	\$3,000
Total price if purchased separately	\$5,000	\$3,000
Special bundled price for training and mentoring - If purchased together	\$4,000	\$2,000

Schedule

Topic	Date (Fridays)	Time
Identify Opportunities	June 25th	8:30 -10:30 a.m.
Developing Strategies	July 9 th	8:30 -10:30 a.m.
Measuring Results	July 16th	8:30 -10:30 a.m.
Creating Accountability	July 23rd	8:30 -10:30 a.m.

Location

All classes will be held at the Napa Valley Vintners Association facility.



From Learning to Doing

Over the years we have watched many vintners go through our Winery Education Center and leave with amazing energy and great plans for change. They have the tools and the desire to execute. But we've watched those same vintners become frustrated when they have difficulty getting their plans off the ground. The critical missing piece is external accountability. That's where we can help. We'll hold your feet to the fire and make sure you get it done.

How it Works

Over the course of nine months, we'll sit down together and see how it's going. We will spend an hour each month reviewing your plans, your measurements, and your progress. Together we will review your timeline, identify any roadblocks, celebrate the victories, and help you make revisions as needed. At the same time, we will help you spot new trends reflected in key indicators.

These nine visits will give you experience with a structured process you can apply to other projects that you tackle. After nine months of practice, you'll have the confidence to keep working, to keep questioning, and to lead your team.

These are some of the areas we'll cover during our meetings:

1. Based upon the priorities you established in class, where are you today?
2. What are your successes?
3. What are your challenges?
4. What are the next steps needed to move forward?
5. How is your dashboard functioning?
6. What has changed from your original assumptions?

How to Register

Our meetings will be a place for you to confidentially share your concerns and get a reality check of your plans and results.

Don't just plan. Act.

Please call Jan Massoletti at our office (707) 963-4466 to register for this unique opportunity.