



To Napa Valley Vintners,

We would like to invite you to join us in our sixth year of classes at the **Napa Valley Winery Education Center**. Brotemarkle, Davis & Co. and Silicon Valley Bank are proud to join forces to again offer this opportunity for winery owners to gain a new perspective on their business.

We have developed a series of workshops that draw from nationally proven strategic performance management techniques to help winery owners achieve their goals. Our program includes seven sessions that walk you through concepts using interactive discussion, hands-on exercises, and specific tools. We help you identify your goals and then help you define a strategy to achieve them using ideas that you can immediately apply. When you finish the training, you will know how to empower, motivate, and reward your teams so you have more time to focus on critical activities.

Here's what one participant had to say:

"The Strategic Performance Management Workshop 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

Enclosed is a brochure that provides an overview of the workshops and the topics covered. We plan to host two groups this year, each limited to the first five wineries that register. Our first session begins February 5, 2009 so now is the time to make your plans to start 2009 with a clear path to success.

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

I look forward to meeting you.

Sincerely,

Craig A. Underhill, CPA, CSPM

Partner

Enclosure

P.S. - As a member of the **Napa Valley Vintners**, if you sign up for the workshops we will provide an additional session, "Understanding Behavioral Profiles to Improve Communication" at no additional charge. You will also receive your own comprehensive behavioral analysis. This free session has a \$400 value.

What Participants are saying...

Tom Clark & Laurie Claudon of Clark-Claudon Vineyards:

"The Strategic Performance Management Workshop 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."

John and Tracey Skupny of Lang & Reed Wine Company:

"Since completing this series of workshops, with its very clear and dynamic concepts, we have honed our skills, designed a personal approach to performance, and even discovered untapped energy for success. All through simple, straightforward steps that make really big jobs feel more manageable. What a relief!"



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NAPA VALLEY WINERY EDUCATION CENTER

2009 SCHEDULE 9:00 - 11:00

Group 1

- | | |
|-------------------------|-------------------------|
| 1. Feb 5 th | 5. Apr 2 nd |
| 2. Feb 19 th | 6. Apr 16 th |
| 3. Mar 5 th | 7. Apr 30 th |
| 4. Mar 19 th | 8. May 14 th |

Group 2

- | | |
|-------------------------|-------------------------|
| 1. Feb 12 th | 5. Apr 9 th |
| 2. Feb 26 th | 6. Apr 23 rd |
| 3. Mar 6 th | 7. May 7 th |
| 4. Mar 26 th | 8. May 14 th |

If you are unable to attend a scheduled session, you may make it up by attending the other group's related session.

WINERY EDUCATION CENTER

Located at:

Silicon Valley Bank
Conference Center
899 Adams Street
St. Helena

NAPA VALLEY WINERY EDUCATION CENTER

Will enable you to...

Clarify your vision, develop strategies, and create a measurement system



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Silicon Valley Bank*



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WHY THE NAPA VALLEY WINERY EDUCATION CENTER?

Our local wine industry exists in a competitive global marketplace. Through the hard work of local vintners, the industry has matured. Yet to be developed, however, is a system to efficiently manage a business in this industry.

Craig Underhill, a partner at Brotemarkle, Davis & Co. LLP, has developed a very useful hands-on education program. This business training program is specifically designed for the wine industry. Craig utilizes nationally proven techniques and tools to streamline the management process so the owner/manager has more time for what is important in his/her business.

We have put many on our banking team through the program so we could understand the value of the workshop. The result was the sponsorship of the Napa Valley Winery Education Center. Craig Underhill will conduct the workshop from our facility.

PERFORMANCE MANAGEMENT WORKSHOP

The workshop consists of seven two-hour sessions held semi-monthly in the Napa Valley Winery Education Center. Since each workshop builds upon the prior one, uninterrupted attendance is crucial to the learning process. To accommodate your travel schedules, two workshop groups will be set up. Thus, if you are unable to make the scheduled date of a session, you can make it up by attending the other group's session.

WORKSHOP CURRICULUM

Session 1 - Financial Fluency - Part 1

- Learn the Basics of Financial and Business Statements
- Discover the Link Between Business Activities and Financial Outcomes
- Learn How the Profit Equation Ties it all Together

Session 2 - Understanding Your Business

- Learn the Importance of Working ON Your Business
- Define Performance Measurement
- Discover Why Performance Measurement is so Important
- Learn How to Get Your Team to Care

Session 3 - What Keeps You Up at Night?

- Complete a Business Wellness Questionnaire
- Diagnose the Health of Your Business
- Develop and Clarify Your Vision

Session 4 - Why a Hierarchy of Measures?

- Complete a SWOT Analysis
- Learn a Step-by-Step Introduction to Performance Management
- Discover the Impact on Revenue

Session 5 - Measuring and Reporting

- Develop Systems to Measure
- Create a Flash Report
- Discover the Business Dashboard

Session 6 - Financial Fluency - Part 2

- Learn How to Improve Cash Flow
- Discover a winery's cash drivers

Session 7 - Reward the Right Way

- Make Sure Everyone Understands the "Rules of the Game"
- Develop an Incentive Culture
- Link Rewards to Your Vision

Session 8 - Improving Communication

- Bonus Session for members of the Napa Valley Vintner's Association

TUITION POLICY

The investment in tuition is \$2,000 for each winery. This allows the owner and one other person from the winery to participate in the program. The tuition is payable in advance in monthly installments of \$500. If tuition is paid in full prior to the first session, a \$100 discount will be given. A credit card will be required for those selecting the installment plan. All payments are made payable to Brotemarkle, Davis & Co. LLP.

Because each session builds upon the prior one, attendance each month is crucial to the learning process and no tuition refunds are available for missed sessions. However, a session can be made-up by attending another day. See the schedule for details.

ADMISSIONS

Contact Jan Massoletti at Brotemarkle, Davis & Co. LLP to register for our next workshop, as spaces are limited to five businesses in each group.

Phone: 963-4466

Fax: 963-4712

www.bdcocpa.com

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**NAPA VALLEY
WINERY EDUCATION CENTER**

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2009 REGISTRATION FORM

Participant's Name: _____

Participant's Name: _____

Winery Name: _____

Registering for:

Group 1: Starts Thursday February 5th

Group 2: Starts Thursday February 12th

Tuition Policy:

The investment in tuition is \$2,000 for each winery. This allows the owner and one other person from the winery to participate in the program. An installment plan is available, under which \$500 is due on the first of each month. If tuition is paid in full prior to the first session, a \$100 discount will be given. A credit card will be required for those selecting the installment plan. Because each session builds upon the prior one, attendance at each session is crucial to the learning process and no tuition refunds are available for missed sessions. However, a session can be made-up by attending on the other group's day. See the schedule for details.

Credit Card Information:

Bank Card Type: (Visa) or (MasterCard)

Credit Card Number: _____ Expiration Date: _____

Security Code (last 3 digits on back of card): _____

Name on Card: _____

Signature: _____

Fax back to Jan Massoletti