

## **May 27: ShipCompliant User Training**

*Training sessions for beginner and advanced ShipCompliant users. Attend as part of your Wine Summit registration or sign up separately for user training only.*

3:00-3:45pm

### **Keys to a Healthy Account**

Your ShipCompliant account is only as good as the data that is entered into it. Our team will share best practices to keep your account healthy, secure and running smoothly.

4:00-5:00pm

### **Track 1: Get it Done Right: The Ins and Outs of State Filings**

From report settings to reconciliation, come ready to learn all things related to state filings from our experts so you can have peace of mind that your filings are done right when managed in ShipCompliant.

### **Track 2: Oh Ship! Fulfillment Best Practices**

Getting packages out the door in an efficient manner is more important than ever. Learn fulfillment management tips and best practices to keep shipments from being held up.

5:15-6:00pm

### **Track 1: Getting a Handle on Brand Label Registrations**

This session is focused on getting products ready for market using ShipCompliant Market Ready. We'll unpack product research, COLA submissions and state brand label submissions so your team can stay on track when bringing new products to market.

### **Track 2: Let's Talk About DEX! (Delivery Experience, That Is)**

In the face of ever-increasing customer expectations, learn how ShipCompliant Delivery Experience can help enable your team provide the best possible experience during the shipping process through winery shipment statistics, automated email tools and a view into all winery shipments.

6:00-7:00pm

### **Networking Reception**

## **May 28: Wine Summit Main Event**

7:30-8:30am

Registration and Breakfast

8:30-9:00am

Sovos Opening Session

9:00-10:00am

**Change With Enthusiasm: The Four Strategies To Create a Proactive, Engaged Culture**

Keren Eldad

Experience first-hand the insights and inspiration of business coach and speaker Keren Eldad, a.k.a Coach Keren, a trusted advisor to industry-leading powerhouses such as Christian Dior/LVMH, Van Cleef & Arpels, Vacheron Constantin. Keren's keynote will examine four strategies to create a proactive, engaged culture which have helped companies make significant breakthroughs in the profitable growth of their business while revitalizing their energy and defining meaning.

10:00-10:30am

Break

10:30-11:30am

**General Session: The Modern Wine Market: Trends and Analysis Shaping Wine Sales**

Rob McMillan, EVP and Founder, Silicon Valley Bank

Rob McMillan is well regarded as one of the foremost experts on the wine market and is author of the annual Silicon Valley Bank State of the Industry report. As the wine industry continues to adapt to shifting marketplace trends, including generational differences and competition from new product types, hear Rob share his findings and recommendations for the continued, future health of wine.

11:30am-12:20pm

**General Session: Regulatory Updates**

Matthew Botting, General Counsel, California Alcoholic Beverage Control

Hear directly from the regulating agencies governing the wine industry where they will discuss a range of issues affecting the wine industry. Additional participating agencies TBA.

12:20-1:20pm

Lunch

1:20-2:10pm Breakout Sessions

**Track 1, Session 1: Sales Tax and the DtC Shipper**

Chuck Maniace, VP, Regulatory Analysis and Design, Sovos

Managing sales tax calculations and reporting is a critical component of any successful DtC wine shipping business. But sales tax compliance is not easy! With different rates and reporting requirements in every state you ship to, there's a lot to keep track of. And having to apply all these rules in real time so you are collecting the correct taxes from your consumers just adds to the headaches. Hear from Sovos's VP of Regulatory Analysis and Design on the evolving sales tax landscape, how it applies to DtC wine shippers, and what you should be aware of to stay ahead of your sales tax compliance.

**Track 2, Session 1: Seizing Digital Opportunities to Grow Your Business**

With customers expecting everything to be online, are you missing opportunities by not using your digital footprint to its fullest potential? Our experts will discuss market trends that drive consumer behavior and share suggestions on how to be proactive on the digital frontier so your business can thrive.

**Track 3, Session 1: Building Self-Awareness for Better Business Outcomes**

Vanessa Diaz, Learning & Development Manager, Sovos

We at Sovos believe that increasing self-understanding leads to more effective work—even breakthroughs in our business. In this session, Vanessa will share how having a better understanding of ourselves and our peers enables us to enjoy effective relationships at work. Learn about key personality traits and how to apply these insights about yourself and others to improve communications and get things done.

2:10-2:30pm

**Break**

2:30-3:20pm Breakout Sessions

**Track 1, Session 2: Compliance Never Ends: Make Sure Your Operations Are Following the Latest Changes**

From land usage to online marketplaces, a winery's compliance issues never end. Over the last few years, there have been a great number of new and updated rules that wineries must comply with, which range from managing your consumers' personal data (CCPA) to improving the accessibility of your website to greater disclosure of potential public safety concerns (Prop 65). Hear from a group of attorneys and compliance partners on what all has changed, what you need to think of when managing your compliance, and where these rules might go next.

**Track 2, Session 2: Staying Relevant: Marketing Best Practices to Gain and Maintain Customer Loyalty**

Karen Bonarrigo, Chief Administrative Officer/Owner, Messina Hof Winery

Speaker TBA, Nakedwines.com

We'll examine how Messina Hof Winery and Nakedwines.com, among the winners of last year's Vinnies customer awards, drive customer engagement and loyalty with their innovative approaches to marketing and operations.

**Track 3, Session 2: Insights into Change Management**

Vanessa Diaz, Learning & Development Manager, Sovos

As they say, the only constant is change—in our industry, in our technology, and in our world. The way we respond to events of change both reflects and is shaped by our personalities and character traits. In this session we'll dive into how these characteristics inform our own, and others', responses to change. Vanessa will share tips and tricks for applying these insights to navigating and thriving amidst the changes that surround us.

3:20-3:40pm

**Break**

3:40-4:40pm

**Keynote: State of the Industry**

Steve Gross, Vice President, State Relations, Wine Institute

Always a crowd favorite, we'll hear Steve deliver his highly-anticipated deep dive on the status of the wine industry and what's on the horizon in the coming months and years.

4:40-5:00pm

**Closing Session**, including presentation of the Vinnners customer awards

5:00-6:00pm

**Wine Party/Networking Reception**