

SUCCEEDING AS WOMEN LEADERS IN THE WINE INDUSTRY:

AN EXECUTIVE SYMPOSIUM

EVENT DATE March 6, 2017

LOCATION CIA at COPIA, Napa Valley Vintners Theater

PURPOSE

The Symposium is intended to assist women in management in the industry identify strategies and tools for advancing to professional leadership roles in the industry.

The program will also introduce the first report systematically tracking the current status of women in leadership roles in the industry, to be annually updated. (“Women in Wine Industry Leadership Report”)

PRESENTED BY

Red Cabs is a forum of women in leadership positions in the wine industry created to enable its members:

1. To share information and help & support each other
2. To help champion women in leadership positions in the industry

Red Cabs is a voluntary, non-profit peer organization of more than 70 women in management roles in the industry that has been meeting regularly since 2009.

PROGRAM

8:30 A.M. REGISTRATION, COFFEE, LIGHT REFRESHMENT

9:00 – 9:30 A.M.

**SETTING THE STAGE: FIRST ANNUAL REPORT TRACKING
WOMEN IN LEADERSHIP POSITIONS IN THE WINE INDUSTRY, PHASE I**

Sponsor Introduction: **Suzann Russell**, Director, Silicon Valley Bank
Presenter: **Barbara Insel**, President, Stonebridge Research Group LLC

9:30 – 10:30 A.M.

PANEL: WOMEN LEADERS IN THE WINE INDUSTRY

- Restaurants: **Mary Melton**, Wine Director, PF Chang's
 - Wine Production: **Cathy Corison**, Proprietor/Winemaker, Corison Winery
 - Winery Management: **Susan Doyle**, General Manager, Spring Mountain Vineyards
 - Wholesale: **Kimberly Geronimos**, VP Estates Group, Young's Market
- Moderator: **Lauren Ackerman**, Co-Proprietor, Ackerman Family Vineyards

10:30 – 10:45 AM Coffee Break

10:45 - 11:30 AM

**KEYNOTE: TOOLS WOMEN CAN USE TO ADVANCE IN LEADERSHIP
ROLES**

Kathryn Kolbert

Constance Hess Williams '66 Director, Professor of Leadership Studies,
Athena Center for Leadership Studies at Barnard College of Columbia
University

11:30 – 12 NOON

**PRESENTATION: MCKINSEY "WOMEN IN THE WORKPLACE, 2016"
REPORT: THE FINDINGS AND WHAT THEY MEAN TO YOU**

Kelsey Robinson, Partner
Julie Norseen, Engagement Manger
McKinsey & Co.

12:00 – 1:00 PM

PANEL, WHAT CAN WE LEARN/TOOLS FROM OTHER INDUSTRIES

- **Kelsey Robinson**, Partner, and **Julie Norseen**, Engagement Manager, McKinsey
- Film: **Alison Emilio**, Director of the Systemic Change Project, a joint initiative of Sundance Institute and Women In Film Los Angeles. (The SCP is coalition of industry leaders taking tangible steps to bring about measurable progress in achieving gender equity, with an initial emphasis on female directors in film and television.)
- Consulting: **Carol Lindstrom**, Vice-Chair, LLP (retired) and co-owner, Lindstrom Wines
- Technology: **Kate Mitchell**, Co-Founder and Partner, Scale Ventures; Member, Board of Directors, Silicon Valley Bank. Co-Founder, National Venture Capital Association Inclusion & Diversity Task Force

Moderator: **Debi Benedetti**, Coach, Beyond the Possible, Director, Women's Foodservice Forum and Adjunct Professor, Culinary Institute of America

1:00 PM:

PERSPECTIVE: WHERE WE ARE, HAVE BEEN AND ARE GOING

Joyce Goldstein

Pioneering Restaurant Icon, James Beard Award Winning Chef, Author of of 29 cookbooks and co-founder of Women Restaurateurs and Chefs

1:30 PM: LUNCH AND NETWORKING

SPEAKER BIOGRAPHIES

Lauren Ackerman, Co-Founder, Ackerman Family Winery

Lauren is co-owner and acting manager of Ackerman Family Vineyards (AFV), a small producer of cabernet sauvignon wines harvested from her 16-acre vineyard located in the Coombsville AVA within southeastern Napa Valley. She and her husband purchased vineyards in 1994 and began producing small amounts of wine. Their first commercial vintage was in 2003 with 300 cases of cabernet sauvignon. She is responsible for strategic planning, production, sales/marketing, hospitality, events, compliance, finance and customer service for the winery. Before starting AFV in 2006,

Lauren had an international management-consulting firm working in the information technology industry.

Napa, California - lauren@ackermanfamilyvineyards.com

Debi Benedetti, Strategist, Coach, Explorer

Debi is a Certified Executive Coach who specializes in assisting executives, leaders and entrepreneurs in exploring unrealized goals and personal strategic plans. As a founding corporate officer of Bon Appetit Management Company and at various positions in Saga and Marriott Corporations, Debi served such clients as Oracle, HP, Stanford University, University of Pennsylvania, The Getty Center and Pac Bell Park. She has served as an adjunct professor at The Culinary Institute of America, was a charter member of the Advisory Board at UNLV's Harrah's College of Hotel Administration and is a Conti Professor in the Hotel School at Penn State University. Debi was named the Conrad Hilton Distinguished Lecturer at San Diego State University.

Santa Rosa, California - Debi@beyondthepossible.com

Cathy Corison, Proprietor/Winemaker, Corison Winery

Cathy Corison was the first woman Winemaker-Proprietor in the Napa Valley. Corison produces two Cabernet Sauvignons, hand-crafted without compromise from bench-land vineyards between Rutherford and St. Helena. Her aim is to make wines that are powerful and elegant at the same time, have a sense of place, are structured to grace the table and enjoy a long, distinguished life. Corison earned a B.A. in Biology from Pomona College in Claremont, CA and an M.S. in Enology from U.C. Davis. Her early winemaking career began working for Chappellet Vineyard, Staglin Family Winery, Long Meadow Ranch and York Creek Vineyards. After making wine for others for many years she started buying grapes and barrels in 1987, custom-crushing at several wineries until 1999 when she and her husband built their own winery in St. Helena.

St. Helena, California - cathy@corison.com

Susan Doyle, GM and Director of Vineyards & Winemaking, Spring Mountain Vineyard

Susan was born in Tasmania and after gaining a degree in Environmental Science, she pursued post graduate study in Enology & Viticulture in Canterbury, New Zealand. She began her winemaking career in Australia at such properties as Pipers Brook and Morrilla Estate in Tasmania and Yarra Ridge Winery in Victoria. Prior to joining Spring Mountain Vineyard, Susan was the Director of Winemaking and Innovation for all domestic and international brands for Diageo Chateau & Estates Wines.

Napa, California - susan@springmtn.com

Alison Emilio, Director of ReFrame, a joint initiative of Sundance Institute and Women In Film Los Angeles

Alison has built a 25-year career in entertainment marketing, communications, branding, strategic partnerships, fundraising, programming, production, business development, and cultural arts advocacy in both the private and non-profit sectors in the U.S. and Canada. ReFrame is a growing coalition of industry leaders and ambassadors – producers, directors, agents, studio executives – who are taking tangible steps to bring

about measurable progress in achieving gender equity and advancing female filmmakers in film, TV, and media. Alison serves on the Advisory Board of the Horizon Award whose mission is to advance gender parity in media and provide sponsorship and mentorship to the next generation of female filmmakers.

Los Angeles, California - aemilio@wif.org

Kimberly Geronimos, Director of Hotels and Regional Accounts, Young's Market

Kimberly's years of experience include management and business development roles at Pebble Beach Resorts, St. Michelle Wine Estates, Treasury Wine Estates and now at Young's where she manages business worth \$13M annually in prestige account sales. She is recognized for excellence in relationship building, problem solving and ability to manage top tier, prestigious accounts. She is a certified specialist of wine (CSW) and has WSET level 3.

Napa, California - kimberlygeronimos@youngsmarket.com

Joyce Goldstein, Chef and Consultant, Restaurant and Food Industry

Joyce was chef/owner of the ground-breaking Mediterranean Restaurant, Square One, in San Francisco. Prior to Square One, Joyce was chef of the Cafe at Chez Panisse for 3 years. She was founder and director of the California Street Cooking School, San Francisco's first international cooking school. Joyce was voted *San Francisco Focus* magazine's Chef of the Year in 1992. She received the James Beard Award for Best Chef in California for 1993. And in 2005 she received the Lifetime Achievement award from Women Chefs and Restaurateurs. Joyce is a prolific cookbook author with many award-winning titles. Her latest book is *The New Mediterranean Jewish Table: Old World Recipes for the Modern Home*. Joyce has written for magazines including *Fine Cooking*, *Gourmet*, *Wine & Spirits*, and *Food & Wine*, *Vegetarian Times*, and *San Francisco Chronicle*. Joyce is a Founding Member of the Association of Women Chefs and Restaurateurs and served on the Awards Committee for the James Beard Foundation for six years.

San Francisco, California - joycegoldstein@comcast.net

Barbara Insel, President and CEO, Stonebridge Research Group LLC

Stonebridge Research Group is a strategic advisory firm to the wine industry. Stonebridge Research has conducted major US consumer market studies for the Wine Institute, Wines of Chile, Wines from Spain, the French Trade Ministry, New Wines of Greece, Bodegas de Argentina, Napa Valley Vintners, the Office of Champagne, and several U.S. regional wine organizations, major producers, investors and suppliers in the U.S., Europe and Latin America. Stonebridge is currently leading a major market re-positioning project for California's fine wines in the Chinese market. Barbara was previously Managing Director for MKF Research, leading the first study of the national impact of wine and grapes on the US economy and the Wine Institute's first market research project in decades. Before joining the wine industry in 2004, Barbara spent over twenty years in senior positions in international investment and research and strategy focused on the Emerging world markets. Barbara has an MBA from Stanford University, an MA in Economics from Brown University and a BA from Barnard College of Columbia University.

St. Helena, CA - binsel@stonebridgeresearch.com

Kathryn Kolbert, Constance Hess Williams Director of the Athena Center for Leadership Studies at Barnard College

A public-interest attorney, journalist, and visionary in the not-for-profit world, Kathryn brings an extraordinary depth of experience in collaborative leadership, educational programming, and civil rights advocacy. She has been recognized by *The National Law Journal* as one of the "100 Most Influential Lawyers in America," and by *The American Lawyer* as one of 45 public-interest lawyers "whose vision and commitment are changing lives." In 1992, Kolbert argued the landmark case of *Planned Parenthood v. Casey* before the U.S. Supreme Court and has been credited with saving *Roe v. Wade*. Professor Kolbert graduated cum laude from Temple University School of Law, and received her undergraduate degree from Cornell University's School of Arts and Sciences. She has lectured at colleges and universities across the nation and is a frequent commentator on constitutional and women's rights issues in the media.

New York, New York - kkolbert@barnard.edu

Carol Lindstrom, retired Principal and Vice Chairman at Deloitte, LLC

In her Vice Chairman role, Carol served as the Advisory Partner for some of Deloitte's largest clients (HP, Wells Fargo, Visa), building and leading their Strategic Relationship Management and leading a relationship program focused on their top Global clients. Carol joined Deloitte in 1993 to build the technology consulting practice and led that division for many years. She is currently serving on two not-for-profit boards, The UCLA Anderson School and the Workday Foundation. Carol served as the President of the Deloitte Foundation for many years, and before joining Deloitte, was a partner at Anderson Consulting.

Napa, California - caroljlindstrom@gmail.com

Mary Melton, Director of Beverage, P.F. Chang's

With over 25 years of industry experience, Mary plans and manages the beverage program for all 200+ restaurants, including a full beverage menu with an extensive wine list, local beers, classic bartender education, and drink innovation. Mary and P.F. Chang's were awarded top National honors for Best Chain Restaurant Wine Program at the VIBE VISTA awards in 2010, Best Chain Wine Program in 2011 and Best Overall Beverage Program in 2012 both at the Cheers Beverage Conferences. Mary was recently featured on the cover of Cheers magazine.

Scottsdale, Arizona - mary.melton@pfchangs.com

Kate Mitchell, Co-founder & Partner, Scale Venture Partners

Scale Venture Partners, a Silicon Valley-based firm, invests in early-in-revenue technology companies looking to scale. Kate and the ScaleVP team have backed successful, high growth companies. Kate is past chairman and board member of the National Venture Capital Association (NVCA) and is active in policy matters that impact entrepreneurship, start-ups & innovation. She co-authored the IPO section of the 2012

JOBS Act is currently the co-chair of the NVCA Inclusion & Diversity Task Force, which focuses on advancing opportunities for women and minorities across the venture ecosystem. Mitchell received the NVCA Outstanding Service Award in 2013 for her policy work on behalf of the venture industry. She currently serves on the board of SVB Financial Group (NASDAQ:SIVB), Fortive Corporation (NYSE:FTV), the Silicon Valley Community Foundation and is a charter member of Environmental Entrepreneurs (Silicon Valley).

Silicon Valley, California - kate@scalevp.com

Julie Norseen, Associate, McKinsey & Company

Since joining McKinsey in 2013, Julie has gained expertise in payor strategy, Medicare growth strategy, clinical trial innovation, pharmaceutical go-to-market strategy, and service operations. Julie did Post Doctorate work studying molecular mechanisms of diabetes at Beth Israel Deaconess Medical Center / Harvard Medical School. She holds PhD in Molecular Biology with a focus on eukaryotic genomic replication from The University of Pennsylvania and a BS in Molecular Biology with a focus on genetics from The Pennsylvania State University.

Silicon Valley, California - julie_norseen@mckinsey.com

Kelsey Robinson, Partner, McKinsey & Company

Prior to joining McKinsey, Kelsey spent over four years at Digitas where she led large client teams focused on cross-channel digital media strategy, performance-based online advertising analytics, and tech-enabled customer targeting. At McKinsey, she is a leader in their Digital Marketing & Sales and Retail practices. She has extensive experience in CRM & Personalization, Digital Marketing, eCommerce growth, Consumer Insights, and Retail Growth strategy. Kelsey holds an M.B.A. from Harvard Business School and a B.S. in Management Science from the Massachusetts Institute of Technology.

San Francisco, California - kelsey_robinson@mckinsey.com

Suzann Russell, Managing Director, Silicon Valley Bank's Wine Division.

Suzann oversees a portfolio of primarily Napa based wineries and vineyards, providing customized commercial loans and treasury management services. Suzann's client's range from small family operated wineries to larger enterprises producing over 500,000 cases annually. Suzann joined Silicon Valley Bank in 2000 as a credit analyst and worked through the lending ranks to her current role. Suzann spent the first three years of her banking career at SVB's headquarters in Santa Clara as a commercial lender for software companies, then switched her focus to wine lending and relocated to SVB's St. Helena office in 2004. Suzann is an active member of the Napa/Sonoma chapter of Women for Winesense. Suzann earned her bachelor's degree in Business Administration with a concentration in Finance from California State Polytechnic University, San Luis Obispo.

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The advertisement features a background image of a vineyard with mountains in the distance. In the top left corner, the 'svb' logo is displayed above the text 'Silicon Valley Bank' and the slogan 'Make next happen now.' The main headline reads 'Liquid Asset Management'. Below this, a sub-headline states: 'Our deep industry knowledge makes us the banking choice of great wineries and vineyards.' The contact information for Suzann Russell is provided: 'Contact: Suzann Russell, T 707.967.1380, srussell@svb.com'. At the bottom, a small copyright notice reads: '©2016 SVB Financial Group. All rights reserved. Silicon Valley Bank is a member of the FDIC and the Federal Reserve System. Silicon Valley Bank is the California bank subsidiary of SVB Financial Group (Nasdaq: SIVB). SVB, SVB FINANCIAL GROUP, SILICON VALLEY BANK, MAKE NEXT HAPPEN NOW and the chevron device are trademarks of SVB Financial Group, used under license. B.WD-16-14924 Rev. 04-26-16.'

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