

# WISE LEADERSHIP FORUM



## What would you give to have your own ‘Board of Advisors’?

For the ability to have access to a trusted group of peers – all committed to leadership development just like you are – who can offer you direction based on their own relevant experiences?

## Join a WISE Leadership Forum Today . . .

Experience invaluable peer-to-peer professional learning and support, coupled with the best of the WISE Academy’s leadership development programs.

**WHAT:** Each WISE Leadership Forum includes a select group of wine-industry leaders who have a core experience base in common. They meet for four hours, six times a year in an atmosphere of confidentiality, trust and openness to support each other’s professional and personal success and leadership development. Led by a certified WISE Forum Moderator, forums follow specific protocols to ensure a safe and effective environment for idea exchange. Convenient meeting locations and dates are determined by each forum.

**WHO:** Each forum will include 8 to 12 peer members plus a moderator. There are three different forum categories – you will be matched with the one that best fits your own experience base:

- ★ **Executive Leadership Forum** – for owners, CEOs, presidents and general managers of wineries and wine-related companies *Cost \$2,000 per year.*
- ★ **DTC Masters Forum** – for experienced winery DTC executives who are in charge of all DTC channels at their winery including tasting room, wine club, online, events, etc. *Cost \$1,500 per year.*
- ★ **DTC Leaders Forum** – for experienced winery DTC managers with various expertise including tasting room managers, wine club managers, online / ecommerce managers, social media managers, event managers, CRM managers, etc. *Cost \$1,000 per year.*

**WHY:** Benefits of forum extend beyond the power of the meetings:

- Have a trusted board of advisors at your finger tips
- Get support, feedback, and network with other industry leaders
- Continue your commitment to your own WISE leadership development process
- Enjoy access to WISE Alumni benefits including speaker series, mystery shopping services, behavior profiling, on-site coaching and on-going WISE education.

**COMMITMENT:** What you get out of forum is directly related to what you put into it.

- Most forum members are WISE alumni so they share a common experience and lexicon.
- Full participation – in as many of the six meetings a years as possible – is strongly encouraged.
- Each member is encouraged to become forum trained within their first year. The four-hour forum training program focuses on leadership communication and mastering forum protocols. *Cost is \$250.*

**COSTS:** There is an annual fee for each WISE Leadership forum and one time training (outlined above). Additional costs (if any) for forum meeting space, food and beverage, retreats are at the discretion of each forum. WISE provides all educational and support materials used during forum.

## NEXT STEPS:

1. Please fill out the WISE Leadership Forum application form.
2. Forum matches will be completed in Spring 2017 will be ready to launch soon thereafter.
3. Upon acceptance to a forum, please confirm your participation with payment of the annual fee.
4. Select (along with your forum) six convenient meeting dates and locations for the upcoming year.
5. Schedule upcoming forum training (date TBD) – sometime during your first year in forum.

# WISE LEADERSHIP FORUM



## Membership Application

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Title: \_\_\_\_\_  
Address: \_\_\_\_\_

E-Mail: \_\_\_\_\_  
Website: \_\_\_\_\_  
Phone (w): \_\_\_\_\_  
Phone (m): \_\_\_\_\_

Please fill out the following information to better help us place you in an appropriate WISE Leadership Forum:

1. Which WISE Leadership Forum are you applying to? \_\_\_\_\_
  - A. **Executive Leadership Forum** – for owners, CEOs, presidents and general managers of wineries and wine-related companies. *Cost \$2,000 per year.*
  - B. **DTC Masters Forum** – for experienced winery DTC executives who are in charge of all DTC channels at their winery including tasting room, wine club, online, events, etc. *Cost \$1,500 per year.*
  - C. **DTC Leaders Forum** – for experienced winery DTC managers with various expertise including tasting room managers, wine club managers, online / ecommerce managers, social media managers, event managers, CRM managers, etc. *Cost \$1,000 per year.*
2. Your Company
  - Size (# cases or \$ sales / year) \_\_\_\_\_
  - # of Total Employees \_\_\_\_\_
  - % sold DTC (cases or dollars) \_\_\_\_\_
3. Your Role
  - How long have you been with your current company? \_\_\_\_\_
  - How long have you held your current position? \_\_\_\_\_
  - Number of direct reports? \_\_\_\_\_
  - Total number of team members reporting in to you? \_\_\_\_\_
  - Scope of responsibility (your # cases or \$ sales / year) \_\_\_\_\_
  - Previous Jobs / Relevant Work Experience \_\_\_\_\_
4. Your leadership strengths you are most proud of:  
\_\_\_\_\_  
\_\_\_\_\_
5. Biggest leadership challenge you are currently facing:  
\_\_\_\_\_  
\_\_\_\_\_
6. What do you hope to get out of your WISE Leadership Forum experience?  
\_\_\_\_\_  
\_\_\_\_\_

Please scan & email this application back to: [info@wineindustrysaleseducation.com](mailto:info@wineindustrysaleseducation.com) or go to:  
[https://www.surveymonkey.com/r/WISE\\_Forum](https://www.surveymonkey.com/r/WISE_Forum)