

# 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 . . .

Our wine-industry leadership forum program, called the WISE Cabinet, allows you to experience invaluable peer-to-peer professional learning and support, coupled with the best of the WISE's leadership development programs.

**WHAT:** Each WISE Cabinet 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 Moderator, each Cabinet follows specific protocols to ensure a safe and effective environment for idea exchange. Convenient meeting locations and dates are determined by each Cabinet.

**WHO:** Each Cabinet will include 8 to 10 peer members plus a moderator. There are three different Cabinet categories – you will be matched with the one that best fits your own experience base:

- ★ **Executive Leadership Cabinet** – for owners, CEOs, presidents and general managers of wineries and wine-related companies. *Cost \$2,500 per year.*
- ★ **DTC Masters Cabinet** – 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 \$2,500 per year.*
- ★ **DTC Leaders Cabinet** – for experienced winery DTC managers with various expertise including tasting room managers, wine club managers, digital managers, event managers, CRM managers, etc. *Cost \$1,500 per year.*

**WHY:** Benefits of being in a WISE Cabinet extend beyond the power of the meetings:

- Have a trusted board of advisors who are there to support you
- Experience solutions-based feedback and effective networking with other industry leaders
- Continue your commitment to your own leadership development process
- Enjoy access to WISE Alumni benefits including speaker series, mystery shopping services, behavior profiling, on-site coaching, on-going WISE education, and custom programs and services.

**COMMITMENT:** What you get out of being in a WISE Cabinet is directly related to what you put into it.

- Most Cabinet members are WISE alumni so they share a common experience, lexicon and standards.
- Full participation – in as many of the six meetings a years as possible – is strongly encouraged.
- Cabinets may elect to hold an annual retreat and/or other activities to increase their impact as a group.

**COSTS:** There is an annual fee for each WISE Cabinet member. Additional costs (if any) for food and beverage, retreats or other forum activities are at the discretion of each Cabinet. Meeting space is provided by participating Cabinet members or WISE. WISE provides all educational and support materials used during forum.

### NEXT STEPS:

1. Please fill out the WISE Cabinet interest form. We will contact you to discuss placement opportunities.
2. Cabinet matches will begin in Fall of 2018 and will be ready to launch soon thereafter.
3. Upon acceptance into a Cabinet, please confirm your participation with payment of the annual fee.
4. Select (along with your forum mates) six convenient meeting dates and locations for the upcoming year.
5. Attend your first WISE Cabinet kickoff meeting!

# WISE LEADERSHIP FORUM

## Membership Interest Form

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

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

Please fill out as much of the following information you are comfortable with. This information will better help us place you in an appropriate WISE Cabinet. You will be contacted directly for next steps.

- Which WISE Cabinet category are you applying to? \_\_\_\_\_
  - Executive Leadership Cabinet** – for owners, CEOs, presidents and general managers of wineries and wine-related companies. *Cost \$2,500 per year.*
  - DTC Masters Cabinet** – 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 \$2,500 per year.*
  - DTC Leaders Cabinet** – 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 \$1,500 per year.*
- Your Company
  - Size (# cases or \$ sales / year) \_\_\_\_\_
  - # of Total Employees \_\_\_\_\_
  - % sold DTC (cases or dollars) \_\_\_\_\_
- 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 \_\_\_\_\_
- Your leadership strengths you are most proud of:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Biggest leadership challenge you are currently facing:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- What do you hope to get out of your WISE Cabinet experience?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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