

A photograph of two hands clinking glasses of champagne at a bar. The background is blurred, showing other patrons and bottles. The image is partially covered by a dark blue diagonal band.

shipCOMPLIANT

10th Annual

DIRECT

Direct Sales Conference

MAY 28 & 29 | NAPA, CA

CONFERENCE PROGRAM

DAY 1 (Thursday, May 28)

START TIME	END TIME	AGENDA ITEM	ROOM
7:00 AM	8:15 AM	Registration & Partner Showcase	Foyer
8:00 AM	9:45 AM	Welcome / General Session A Look at the Evolving DtC Industry -- Jason Eckenroth, President and Founder, ShipCompliant Be a Hospitalian: Distinguishing Between Service & Hospitality -- Bobby Stuckey, Master Sommelier/Owner, Frasca Food and Wine	Grand Ballroom
9:45 AM	10:15 AM	Networking Break & Partner Showcase	Foyer
10:00 AM	12:00 PM	ShipCompliant 1:1 Meetings (Reservation required)	C3
10:15 AM	11:30 AM	Keynote Presentation The Freak Factor: Discovering Uniqueness by Amplifying Weakness -- David Rendall, Author, <i>The Freak Factor</i>	Grand Ballroom
11:30 AM	12:30 PM	Lunch & Partner Showcase	Foyer & Courtyard
12:30 PM	1:50 PM	Afternoon General Session State-by-State Legislative Updates -- Steve Gross, VP, State Relations, Wine Institute DtC and 3T: Striking a Balance (Part 1) -- Ken Fredrickson, Founder, Tenzing Wine and Spirits -- Jo Moak, Senior VP and General Counsel, WSWA	Grand Ballroom
1:00 PM	4:00 PM	ShipCompliant 1:1 Meetings (Reservation required)	C3
1:50 PM	2:05 PM	Networking Break & Partner Showcase	Foyer
2:05 PM	3:35 PM	In-Depth Breakout Sessions DtC and 3T: Striking a Balance (Part 2) -- Ken Fredrickson, Founder, Tenzing Wine and Spirits -- Bobby Stuckey, Master Sommelier/Owner, Frasca Food and Wine Regulatory Review -- Jeff Carroll, VP Compliance and Strategy ShipCompliant (Moderator) -- Susan Evans, Executive Liaison for Industry and State Matters, TTB -- Matthew Botting, General Counsel, California ABC -- Matt Walsh, VP Tax, Sovos Compliance Marketing to the Next Generation -- Jonathan Cristaldi, Deputy Director, The SOMM Journal (Moderator) -- Kelly Dressler, Public Relations Coordinator, Opus One Winery -- John Gillespie, Founder and CEO, Wine Opinions -- Josh Phelps, Proprietor, Taken Wine Company -- Christina Turley, Director of Sales & Marketing, Turley Wine Cellars Opportunities in Direct Wine Fulfillment -- Zander Adell, Founder & CEO, Doorman (Moderator) -- Laine Adderley, VP Operations, WineShipping -- Zack Crafton, Director of Operations, NakedWines.com -- Ari Radetsky, VP Customer Experience, Club W -- Matt Wood, Estate Director, Domaine Chandon The Freak Factory: Making People Better by Helping Them Get Worse -- David Rendall, Author, <i>The Freak Factor</i>	Grand Ballroom Room A Room B2 Room B1 Room C1
3:35 PM	3:50 PM	Networking Break & Partner Showcase	Foyer
3:50 PM	5:20 PM	Closing Session PEAK: How Great Companies Get Their Mojo from Maslow -- Chip Conley, Head of Global Hospitality, Airbnb; Founder, Joie de Vivre Hotels & Fest300	Grand Ballroom
5:20 PM	6:20 PM	Wine Reception & Partner Showcase	Foyer & Courtyard

AGENDA AT-A-GLANCE

DAY 2 (Friday, May 29)

START TIME	END TIME	AGENDA ITEM	ROOM
7:00 AM	8:00 AM	Registration	Foyer
8:00 AM	8:45 AM	Workshop Session #1 Delivery Experience Workshop Reporting & Analytics Workshop Wholesale Keynote Presentation (Wholesale Gathering) Partner Technology Demo	Room A Room B1 Room B2 Room C1
8:45 AM	9:00 AM	Break	Foyer
9:00 AM	12:00 PM	ShipCompliant 1:1 Meetings (Reservation required)	Room C3
9:00 AM	9:45 AM	Workshop Session #2 Integrations: From Carrier Pigeon to Light Speed Social Media Compliance: Can I Retweet That? WTF? Shape the Industry (Wholesale Gathering) Partner Technology Demo	Room A Room B1 Room B2 Room C1
9:45 AM	10:00 AM	Break	Foyer
10:00 AM	10:45 AM	Workshop Session #3 Data Management for Compliance Everything You Need To Know About Winery Tastings, Events and Sponsorships TTB Allowable Revisions Best Practices (Wholesale Gathering) Partner Technology Demo	Room A Room B1 Room B2 Room C1
10:45 AM	11:00 AM	Break	Foyer
11:00 AM	11:45 AM	Workshop Session #4 Delivery Experience Workshop Open Wholesale Workshop (Wholesale Gathering) Partner Technology Demo	Room A Room B2 Room C1

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WINES & VINES

GENERAL SESSION SPEAKERS

IN ORDER OF APPEARANCE

Jason Eckenroth

President and Founder - ShipCompliant

Jason Eckenroth is an entrepreneur, software executive and wine compliance leader who has harnessed his technology background to create automated compliance solutions for the beverage alcohol industries.

Bobby Stuckey

Master Sommelier/Owner - Frasca Food and Wine

In 2004, Bobby Stuckey earned the Master Sommelier Diploma from the Court of Master Sommeliers. This diploma is considered by many to be the ultimate professional credential in the wine and spirits services industry. In 2008, Stuckey was nominated by the James Beard Foundation as Outstanding Wine and Spirits Professional. In 2010, 2011 and 2012, Frasca Food and Wine was nominated for Outstanding Wine Service, winning the prestigious award in 2013.

David Rendall

Author - The Freak Factor

During the last 15 years, David Rendall has spoken to audiences on every inhabited continent. Prior to becoming a speaker, he was a management professor, stand-up comedian and endurance athlete. He also managed nonprofit enterprises that provided employment for people with disabilities. He has more than 20 years of experience leading people and organizations.

Steve Gross

VP, State Relations - Wine Institute

Steve Gross oversees the activities of Wine Institute's six State Relations Regional Councils and Regional Managers as they address state legislation affecting the wine industry. He also coordinates Wine Institute's legislative and regulatory activities with staff, contract lobbyists and member wineries. Steve regularly participates in many national programs dealing with issues facing the wine industry, both on the legislative and regulatory levels.

Jo Moak

Senior VP and General Counsel - WSWA

Jo Moak manages internal corporate legal matters and advises on regulatory issues facing wholesalers at both the state and federal levels. Prior to joining WSWA, Jo was an associate with Hogan & Hartson LLP and Darby & Darby P.C., where she had experience litigating various intellectual property disputes in federal court, including cases regarding trademark, patent, and copyright infringement; unfair competition; and defamation.

Ken Fredrickson

Founder - Tenzing Wine and Spirits

Ken Fredrickson is a member of the elite international Court of Master Sommeliers and he currently operates an artisanal wine and spirits wholesaler in Chicago, Illinois. Fredrickson reached the ranks of Master Sommelier in 2000 following critical acclaim for his wine lists while working alongside world-renowned chefs Charlie Trotter, at Charlie Trotter's in Chicago and Las Vegas and Wolfgang Puck, at Spago and Chinois.

Chip Conley

Head of Global Hospitality, Airbnb; Founder, Joie de Vivre Hotels & Fest300

The founder and former CEO of Joie de Vivre Hospitality, Chip Conley began reinventing hotels at age 26. The author of four books, he shares his theories on transformation and meaning applying them to business and life. In 2013, he launched Fest300, where he shares his passion for travel, cultures, and the world's best festivals. He also joined Airbnb as Head of Global Hospitality & Strategy, where he's teaching his methods to hundreds of thousands of hosts in over 200 countries.

(ALPHABETICAL ORDER)

Zander Adell

Founder and CEO - Doorman

Zander Adell is the founder of Doorman, a logistics startup that aims to solve the famous "last mile" problem for mail and package delivery. By receiving your deliveries for you remotely and delivering them to your door by appointment, Doorman aims to make getting your Amazon packages as easy of a process as you could hope for.

Laine Adderley

VP Operations - Wineshipping

Laine Adderley is Vice President of Operations at Wineshipping.

Matthew Botting

General Counsel - California ABC

Matthew Botting has over 16 years of state government legal experience. He was ABC's Chief Legal Counsel from 2000-2004 before he left for a short time to work in private practice and then returned as Staff Counsel III in 2005 until his appointment to General Counsel in 2008.

Jeff Carroll

VP, Compliance & Strategy -

ShipCompliant

Jeff Carroll oversees the direction of ShipCompliant products and services and oversees a team that constantly monitors changes in alcohol regulations across the country. He works with regulators at the state and federal levels to assure ShipCompliant's tools and services meet the evolving needs of their clients.

Zack Crafton

Director of Operations -

NakedWines.com

Zack Crafton oversees bottling, fulfillment and distribution, procurement, and compliance operations. Prior to joining NakedWines.com Zack consulted at a number of wineries in the Napa Valley offering DtC insights gained after starting his own DtC company - Taste Factor. Before succumbing to the glamour of the wine industry, Zack oversaw operations for McMaster-Carr Supply Co. in Atlanta, GA and spent a year in the White House as a special assistant.

Jonathan Cristaldi

Deputy Director - *The SOMM Journal* / *The Tasting Panel Magazine*

In 2013, Jonathan Cristaldi focused his efforts on writing about wine full time. Cristaldi founded The Noble Rot, a clandestine pop-up wine salon that brought together sommeliers, winemakers and amateur enthusiasts. In 2011, he was dubbed a "Wine Prophet" by Time Out New York while building out Ram's Gate Winery's social media presence, working harvest at Alpha Omega Winery and hosting tastings at Swanson Vineyards.

Kelly Dressler

Direct Marketing/PR Coordinator - *Opus One Winery*

Kelly Dressler manages all aspects of social media and supports both the direct business and event teams. Prior to joining Opus One, Kelly led advertising creative and brand identity initiatives on multiple lines of business for clients such as Walmart, Mars Ice Cream Brands, South Beach Diet and Nationwide Insurance.

Susan Evans

Executive Liaison for Industry and State Matters - *Alcohol and Tobacco Tax and Trade Bureau (TTB)*

In her role, Susan Evans works to enhance TTB's interactions with our state government counterparts as well as with TTB-regulated industry members and their representatives. She particularly focuses her efforts in the areas of communication, education, and customer service.

John Gillespie

Founder and CEO - *Wine Opinions*

John Gillespie is the most prominent wine market research authority in the U.S. His career spans more than 30 years, and is highlighted by his leadership of Wine Market Council and direction of the council's ongoing wine market research for more than a decade.

Bahaneh Hobel

Senior Alcohol Beverage Counsel - *Dickenson, Peatman & Fogarty*

Bahaneh Hobel's practice focuses exclusively on all aspects of alcohol beverage law and regulation, including state and federal licensing for wineries, breweries, distilled spirits plants, importers, wholesalers and retailers including hotels and restaurants.

Josh Phelps

Partner - *Taken Wine Co.*

Josh Phelps was raised in the wine industry, learning the business first-hand and making wine with his father, highly-regarded winemaker Chris Phelps. In 2010, Josh and childhood friend Carlo Trinchero launched Taken Wine Company with the tagline, "great wine made by great friends." In 2013, the Taken line of wines were added to the Trinchero Family Estates portfolio.

Ari Radetsky

VP, Customer Experience - *Club W*

Ari Radetsky coordinates efforts across Club W's three major departments - logistics, marketing and the wine program - to make sure members are delighted at every point. Ari manages the systems, reporting, data, testing initiatives and team members that increase member engagement.

John Trinidad

Associate - *Dickenson, Peatman & Fogarty*

John Trinidad works with the Wine Law, Alcohol Beverage, Business, Geographical Indications and Intellectual Property groups. He has advised wine industry clients on a broad range of issues including: the purchase of winery brands; drafting of grape purchase, custom crush, and third party marketing agreements; franchise law; and trademark registration and brand protection.

Kristen Techel

Partner - *Strike & Techel*

Kristen Techel is well versed in all aspects of alcohol beverage law. In particular, she is a specialist in the nationwide advertising, promotion and marketing of alcoholic beverages—including third party providers, sweepstakes, contests, discounts and coupons. A substantial portion of her practice focuses on the legal issues surrounding internet sales models, direct shipment of alcohol and social media.

Christina Turley

Director of Sales & Marketing - *Turley Wine Cellars*

The oldest of Larry Turley's four daughters, Christina Turley spent summers growing up working beside her father in the winery. She became a Certified Sommelier with the Court of Master Sommeliers and became entrenched in the NYC restaurant scene and eventually worked her way up to become the beverage director for the Momofuku Restaurant Group. After eight years in New York her father finally guilted her into returning to her roots. Christina joined Turley full time in 2010.

Matt Walsh

VP Tax - *Sovos Compliance*

Matt Walsh ensures that all Sovos Compliance tax and reporting solutions are compliant with both domestic and international tax laws. He is responsible for providing strategic direction, guidance and recommendations with the product management team and works closely with clients and partners to facilitate initial system implementation, set-up and ongoing compliance needs.

Rebecca Stamey-White

Partner - *Hinman & Carmichael*

In her current practice, Rebecca Stamey-White has a special expertise in crafting legally-compliant advertising, promotions and events and structuring legal unlicensed third party provider relationships. She also provides alcohol beverage licensing, compliance and trade practice advice and defends clients in ABC protest and accusation hearings.

Matt Wood

Estate Director - *Domaine Chandon*

Matt Wood spent 11 years with Icon Estates, a division of Constellation Brands, managing a wide range of direct to consumer businesses, including tasting rooms such as Robert Mondavi Winery, wine clubs, and e-commerce sites like Hartwick and Grove.

GOLD



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A Look at the Evolving Beverage Alcohol Industry

The past year has been a monumental one for ShipCompliant. President and Founder, Jason Eckenroth will start the event off with a recap of the incredible advances ShipCompliant has made in the last year and provide a sneak peek into the exciting new product releases coming up. Additionally, Jason will share his vision for the future of the industry and ShipCompliant's role in that vision.

Speaker

-- Jason Eckenroth, President and Founder, ShipCompliant

Be a Hospitaller: Distinguishing Between Service & Hospitality

Master Sommelier Bobby Stuckey distinguishes between service and hospitality in not only restaurants, but in every area of life. Stuckey will discuss hospitality interventions and how performing authentic acts of hospitality in your work and daily life can change how people feel and experience your brand.

Speaker

-- Bobby Stuckey, Master Sommelier/Owner, Frasca Food and Wine

The Freak Factor: Discovering Uniqueness by Amplifying Weakness

What do you wish you could change about yourself? Are you too loud or too quiet, too hyperactive or too sedentary, too organized or too messy? You get the idea. Most people think that they should find and fix their weaknesses. However, research shows that most of us never make much progress trying to eliminate our worst traits. In fact, our weaknesses are actually the best clue to our strengths. In this funny and counter-intuitive talk, we'll discover how to find success and improve performance by starting with our weaknesses—and amplifying them rather than denying them.

Speaker

-- David Rendall, Author, *The Freak Factor*

State-by-State Legislative Updates

When it comes to understanding the most important legislative changes for wine direct shippers, nobody has a better handle on the shifting landscape than Steve Gross, Wine Institute's VP of State Relations. Gross will run through all the intricacies and implications of recent and upcoming legislative changes.

Speaker

-- Steve Gross, VP, State Relations, Wine Institute

DtC and 3T: Striking a Balance (Part 1)

In this fireside chat, Fredrickson and Moak discuss recent trends in the industry as well as the evolving nature of the 3-tier system, including the recent growth in local delivery services.

SPONSORS

Speakers

-- Ken Fredrickson, Founder, Tenzing Wine and Spirits
-- Jo Moak, Senior VP and General Counsel, WSWA

PEAK: How Great Companies Get Their Mojo from Maslow

By buying and revamping the decrepit inner city Phoenix Hotel in San Francisco, Conley revolutionized the boutique hotel industry. He developed his own unique and transformative business model based on Abraham Maslow's hierarchy of needs, which he illustrates in his bestselling book, *PEAK: How Great Companies Get Their Mojo from Maslow*. During his nearly 24 years as CEO, Joie de Vivre Hospitality grew to become the second largest boutique hotel company in the world by focusing on three key relationships with employees, customers and investors. Today, as Head of Global Hospitality & Strategy at Airbnb, Conley continues to share the brand of leadership that has put him at the forefront of creating extraordinary experiences and organizations.

Speaker

-- Chip Conley, Head of Global Hospitality, Airbnb; Founder, Joie de Vivre Hotels & Fest300



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THURSDAY

DtC and 3T: Striking a Balance (Part 2)

Direct to consumer sales from wineries represent only about 3% of production. Although some wineries ship exclusively to consumers, most choose to do both. This panel will analyze trends in the industry and discuss how to strike a balance between direct shipping and sales through the 3-tier system. How should wineries allocate resources and create a strategy that allows for both channels to flourish? Join us for this thought provoking panel and bring your questions for the experts.

Speakers

- Ken Fredrickson, Founder, Tenzing Wine and Spirits
- Bobby Stuckey, Master Sommelier, Frasca Food and Wine

Grand Ballroom

Regulatory Review

Ask the experts! We'll have regulatory updates from TTB and the California ABC, as well as the latest on sales tax developments and legislation. We'll leave plenty of time for questions, so send them in advance or bring them to this informative panel.

Speakers

- Jeff Carroll, VP Compliance and Strategy, ShipCompliant (Moderator)
- Matthew Botting, General Counsel, California ABC
- Susan Evans, Executive Liaison for Industry and State Matters, TTB
- Matt Walsh, Vice President of Tax, Sovos Compliance

Room A

Opportunities in Direct Wine Fulfillment

Things are changing fast in the world of eCommerce. Sites like Amazon and Zappos are raising consumer standards of service, selection, price, and personalization. How can wineries exceed their customers' heightened expectations in the face of stiff competition and fast-changing fulfillment options? Join us for a panel discussion with eCommerce and fulfillment experts to find out.

Speakers

- Zander Adell, Founder & CEO, Doorman (Moderator)
- Laine Adderley, Vice President of Operations, WineShipping
- Zack Crafton, Director of Operations, NakedWines.com
- Ari Radetsky, VP of Customer Experience, Club W
- Matt Wood, Estate Director, Domaine Chandon

Room B1

Marketing to the Next Generation

With multiple avenues at your disposal, a myriad ways to engage in conversation and seemingly endless opportunities to capture the attention of the next generation of wine drinkers, marketers today have two options: sink or swim. The trick to keeping afloat is in identifying and then defining the rules of engagement specific to your brand. We'll explore topics that will dare you to think creatively and to find excitement in your digital and social marketing efforts.

Speakers

- Jonathan Cristaldi, Deputy Director, The SOMM Journal (Moderator)
- Kelly Dressler, Public Relations Coordinator, Opus One Winery
- John Gillespie, Founder and CEO, Wine Opinions
- Josh Phelps, Proprietor, Taken Wine Company
- Christina Turley, Director of Sales & Marketing - Turley Wine Cellars

Room B2

The Freak Factory: Making People Better by Helping Them Get Worse

In this interactive session you will complete an assessment that identifies your freak factor (the relationship between your distinctive strengths and weaknesses). We'll also explore the applications for your personal life, including marriage, parenting and career. Bring your questions and we'll help you freak out, instead of trying to fit in.

Speaker

- David Rendall, Author, The Freak Factor

Room C1



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Note: Some states restrict consumer off-site purchases. For a list of states that FedEx can transport off-site purchases to, see the FedEx Wine Shipping State Pairing Guide at fedex.com/cgi-bin/wineShipping.cgi. The shipper is responsible for compliance with laws and regulations applicable to its alcohol shipments.

BOOTH #20

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BREAKOUT SESSIONS

FRIDAY

SESSION #1 (8:00 - 8:45 AM)

Delivery Experience Workshop

Learn about ShipCompliant's NEW delivery experience tools from an early-access client and find out how easy it is to start "WOW"-ing your customers. There will be time for Q&A.

Speakers

-- ShipCompliant Product Innovation Team

Room A

Reporting & Analytics Workshop

A current ShipCompliant user will share how to use ShipCompliant's analytics reports to better understand your business. This will include compliance reports, sales reports, advanced label reports and more! There will be time for discussion and Q&A.

Speakers

-- ShipCompliant Analytics Team

Room B1

Wholesale Keynote Presentation (Wholesale Gathering)

Come hear from President Jason Eckenroth and Product Manager Patrick Barratt on where ShipCompliant Wholesale fits into our vision as a company. We strive to create products you love and use to reduce the burden of compliance in the alcohol beverage industry.

Speakers

-- Jason Eckenroth, President and Founder, ShipCompliant
-- Patrick Barratt, Wholesale Product Manager, ShipCompliant

Room B2

Partner Technology Demo

ShipCompliant works closely with most of the industry's largest software providers. View these integrations up close and personal.

Room C1

SESSION #2 (9:00 - 9:45 AM)

Integrations: From Carrier Pigeon to Light Speed

Are you sick of having to constantly import and export data out of ShipCompliant? By using integrations, you won't have to! In this workshop, you will learn about how front-end integrations work, how data is passed over into ShipCompliant, and how you can get started. We will also talk about POS and OMS integrations. There will be time for Q&A.

Speakers

-- ShipCompliant Partner Services

Room A

Social Media Compliance:

Can I Retweet That? WTF?

Social media and wine go together like peanut butter and jelly, but watch out for the regulatory pitfalls! We will explain the basics of social media compliance and give you some expert tips on what to watch out for and how to stay in the clear.

Speakers

-- John Trinidad, Associate, Dickenson, Peatman & Fogarty (Moderator)
-- Susan Evans, Executive Liaison for Industry and State Matters, TTB
-- Kristen Techel, Partner, Strike & Techel

Room B1

Shape the Industry (Wholesale Gathering)

Join an interactive workshop on how we can work together to improve our industry. We will discuss ways that you can get your products to market FASTER! Topics include COLAs, registrations, Product Registration Online (PRO), price posting and sales reporting. We will also talk about how you can provide better visibility into the go-to-market process so that everyone in the organization knows exactly where a product stands in the process. Come with your biggest, craziest and innovative ideas.

Speakers

-- ShipCompliant Wholesale Team

Room B2

Partner Technology Demo

ShipCompliant works closely with most of the industry's largest software providers. View these integrations up close and personal.

Room C1

SESSION #3 (10:00 - 10:45 AM)

Data Management for Compliance

Clients can learn from other clients best practices on how to keep information in ShipCompliant up to date. This includes license information, report subscriptions/frequencies and label registrations. There will be time for Q&A.

Speakers

-- ShipCompliant Client Services Team

Room A

BRONZE

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EXHIBITORS

Everything You Need To Know About Winery Tastings, Events and Sponsorships

Got questions about licensing? From TTB to state and local permits, special events, change of ownership, non-profits and farmers markets, we have answers! Send us your questions in advance or bring them with you as we will have the experts ready to field them.

Speakers

-- Bahaneh Hobel, Senior Alcohol Beverage Counsel, Dickenson, Peatman & Fogarty

-- Rebecca Stamey-White, Partner, Hinman & Carmichael

Room B1

TTB Allowable Revisions Best Practices (Wholesale Gathering)

This panel features TTB's Susan Evans and Bronco Wine Company's Danielle Connolly who will discuss best practices on federal TTB label approvals. Learn about using TTB's allowable revisions efficiently and how to submit the perfect label so it gets approved quickly.

Speakers

-- Danielle Connolly, Compliance Manager, Bronco Wine Company

-- Susan Evans, Executive Liaison for Industry and State Matters, TTB

Room B2

Partner Technology Demo

ShipCompliant works closely with most of the industry's largest software providers. View these integrations up close and personal.

Room C1

SESSION #4 (11:00 - 11:45 AM)

Delivery Experience Workshop

Learn about ShipCompliant's NEW delivery experience tools from an early-access client and find out how easy it is to start "WOW"-ing your customers. There will be time for Q&A.

Speakers

-- ShipCompliant Product Innovation Team

Room A

Open Wholesale Workshop (Wholesale Gathering)

The ShipCompliant Wholesale Team is available for an open session on any and all wholesale topics. Meet with members of our wholesale team to get your most pressing questions answered or share stories about how you use ShipCompliant.

Speakers

-- ShipCompliant Wholesale Team

Room B2

Partner Technology Demo

ShipCompliant works closely with most of the industry's largest software providers. View these integrations up close and personal.

Room C1

COMPANY NAME

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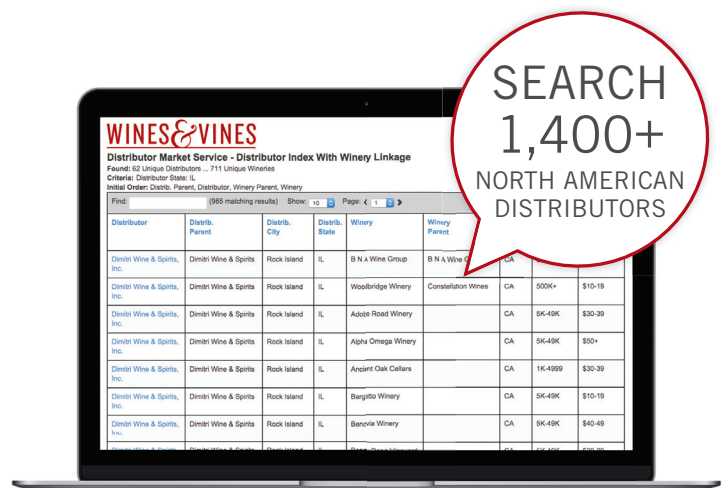


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