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Wine Business Case Research Journal

Vol. 2, No. 1

Editor's Note and Industry Digest

Welcome back to the *Wine Business Case Research Journal*. Our mission is to provide exceptional decision-focused case studies involving real people and real events in the global wine business context. We publish cases in traditional document format and eventually, multimedia cases as well. All cases are grounded in field research to illustrate the complex challenges and opportunities that wine businesses contend with in a dynamically changing marketplace.

Who we are

The WBCRJ is published and disseminated by the Wine Business Institute at Sonoma State University.

Our platform is Scholastica, an open-source, open-access portal, permitting manuscript authors to have complete copyright control over their works after publication. Since the *WBCRJ* is an open-source, open-access journal, instructors can adopt any of these cases for classroom use, free of charge.

Our production coordinator, Valery Vue, and consulting librarian, Rita Premo, are seasoned professionals who work full-time at Sonoma State University, supported by a capable editorial and production team of undergraduate students.

What the Editor looks for in a case

Some highly respected case study researchers and writers that I've known over the years have referred to great cases as "cans of worms for students to kick over and then in a class discussion attempt to get all the worms to wriggle back in."

We advise authors to...

Begin your case research by carefully defining the learning objectives:

- Lay out your instructor's manual before you begin – 3-5 learning objectives, linkages to applicable theory, and questions for discussion
- Show how the learning objectives (LOs) match up with your wine business or other business degree program's LOs and/or course LOs

- List the important evidence and data that need to be collected (and possible sources of those) in order to meet the above objectives

Outline your primary and secondary research strategies in advance:

- Obtain written permissions to conduct field research
- Decide whether or not you will need to impose organizational, character, and/or data disguises
- Plan for both structured and un-structured interviews
- Determine whether or not you will be able to capture content using devices already in hand (such as pencil and paper, mobile phones, still or video cameras, voice recorders, computer software) or will need to budget for the rental or purchase of professional equipment (note: our university library or media studies department or even case client may already be able to provide you with free access to those A-V devices)
- Work with a business librarian to obtain secondary research and data and to help you decide how to present that data, e.g. using infographics
- Cite source materials and acknowledgements as you go along (it can be maddening to try and go back and retrace your steps later)
- Create a contingency plan in case your case client or protagonist suddenly becomes unavailable, becomes unrecognizable, or is unwilling to proceed through a possibly lengthy writing and review process.

Make decisions about content before you create (or become wedded) to it:

Before attempting to gather primary data (field interviews and examination of company documents) and secondary data (information compiled and filtered by someone else), begin with a rough outline that includes five sections:

1. A “hook” capturing a protagonist (central character) encountering (or debating with another character) the strategic crisis or challenge and its urgency (some case writers refer to this section as “the opening gambit”);
2. An industry overview, with data on markets and competitors, exposition of key external or global forces that may impel or impact change;
3. A company or organizational history, including major milestones (or a timeline of key events in its evolution), vision and mission, goals and objectives, current strategies and tactics;
4. A section highlighting current operations, organization structure, governance, corporate social responsibility, organization culture, ethical dilemmas, marketing approaches, leadership style, information systems, financial situation, talent management issues, etc. and consideration of any alternatives to these; and
5. A return to the presenting problem or challenge, with musings from the protagonist as well the “voices” of other stakeholders about the organization’s future directions or options, both short-term and long-term, and their pros and cons.

The Aristotelian rules describing the three unities for drama — unity of action (the decision or challenge), unity of place (i.e., the operating entity), and unity of time (a case must be rooted in a particular time period and written in the past tense) *always* apply to written cases about strategy, although these rules may be somewhat relaxed in the creation of a digital or multimedia case.

For more detailed guidance on this topic, see [“Crafting a Wine Business Case Study and Its Teaching Note: Guidance for Research and Publication”](#) in Volume 1.

Cases in our second volume

We have selected four outstanding cases that reflect a diversity of topics and regions and that represent a diversity of viewpoints regarding the current state of wine business research and practice. They are: Mary Barrett, Luca Gottardi, and Ken Moores’ “Grappling with Grapes: Developing Strategy for the Poncini Vineyards”; Sergio Canavati, Kimberley Benson, and Shaun Richardson’s, “Rara Avis Vineyards: Has This Bird Flown?”; Marc Dressler’s “Strategic Channel Management of Saint Bernhard Winery: Direct Versus Indirect Sales”; and Sergio Canavati, Agusti Casas Romeo, Daniel Rajmil, and Marieshka Barton’s “The Magnificent Five of the Catalan Far West.” For ease of reference, the cases are summarized in the table, “Industry Digest for Volume 2, Number 1.” If you are interested in obtaining the instructor’s manuals (also known as teaching notes) from these case authors, we ask that you contact them directly.

Industry Digest for Volume 2, Number 1 (Spring 2018)

Case / author(s) / contact info	Company/ location (year)	Challenge(s)	Contribution(s) to learning
Grappling with Grapes: Developing Strategy for The Poncini Vineyards Mary A. Barrett* and Luca Gottardi, Wollongong University, New South Wales, Australia Ken Moores, Moores Family Enterprise, Queensland, Australia mbarrett@uow.edu.au	Poncini Vineyards, Trento, Italy, (2015)	Sourcing changes have costs; what are the costs and benefits associated with replanting vineyards with new varietals vs. release prices and how will on-premises and DTC channels respond?	Illustrate wine luxury branding and promotion; evaluate “sticky” pricing and distribution channels; predict how wine club members will react to price changes.

Case / author(s) / contact info	Company/ location (year)	Challenge(s)	Contribution(s) to learning
<p>Rara Avis Vineyards: Has This Bird Flown? Sergio Canavati*, Kimberley Benson, and Shaun Richardson, Sonoma State University, USA sergio.canavati@sonoma.edu</p>	<p>Rara Avis Vineyards (disguised), Monterey and Sonoma, USA (2012)</p>	<p>How can a small family-owned business plan for exit given a dispute over the value of the business to each party, seller and acquirer?</p>	<p>Understand the delicacy of negotiating with a family wine business during a time of transition; evaluate impact of “bolt-on” sales from a winery in a different region on the acquiring winery’s business model.</p>
<p>Strategic Channel Management of Saint Bernhard Winery: Direct Versus Indirect Sales Marc Dressler*, Hochschule Ludwigshafen am Rhein, Germany marc.dressler@hs.lu.de</p>	<p>Saint Bernhard Winery, Hesse, Germany (2017)</p>	<p>How to “sell” expanding the channel list to include new, higher-priced brands on the governing board, trade and direct customers and winery staff?</p>	<p>Identify revenues vs. contribution margins for each beverage category; evaluate options to educate and motivate customers, board members and managers to enhance wine sales up the quality ladder.</p>
<p>The Magnificent Five of the Catalan Far West Agusti Casas and Daniel Rajmil, University of Barcelona, Spain, Marieshka Barton and Sergio Canavati, Sonoma State University, USA canavati@sonoma.edu</p>	<p>Clos Mogador, Clos Dofi, Clos Erasmus, Clos de l’Obac, and Clos Martinet Priorat, Spain (2017)</p>	<p>Should the five producers engage in a co-opetition strategy to advance the region’s global presence in the wine industry, and how to arrive at a consensus among different stakeholders regarding this decision?</p>	<p>Illustrate strategic planning processes for a disparate and often divergent set of family businesses; apply co-opetition theory and strategies to achieve a regional brand equity.</p>

*Contact person

Special thanks to the thirteen expert reviewers (listed below), who provided developmental feedback to case authors — with an average review return cycle of 21.1 days (!) — during multiple stages of review:

Thomas Atkin, Sonoma State University
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We aim to publish one issue per calendar year, so keep an eye out for Volume 3 to be published in Spring 2019.

For information on submitting your case, go to:

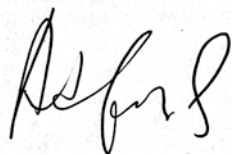
www.sonoma.edu/sbe/wine-business-institute/wine-business-case-journal.

Our Scholastica case submission portal can be found at:

<https://submissions.scholasticahq.com/sites/wine-business-case-research-journal>.

We welcome your feedback on how to improve our journal, so feel free to contact me at the address below. Enjoy our journal.

Very truly yours,



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