Wine Business Institute

Wine Business Case Research Journal

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Vol. 1, No. 1

Editor's Note and Industry Digest

Welcome 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 will publish multimedia cases as well as cases in traditional document format. These cases are grounded in field research to illustrate the complex challenges that wine businesses contend with today.

Who we are

The Sonoma State University Wine Business Institute supports the production and dissemination of the *WBCRJ*.

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.

The *WBCRJ* has assembled a world-class founding Editorial Board. Members include former editors of the *Case Research Journal* (the world's premier case journal, affiliated with the North American Case Research Association), *CASE* (affiliated with the Eastern Case Research Association), *Decanter* (a wine trade magazine in the UK), *Entrepreneurship: Theory & Practice* (cases), *Wine Business Case Studies* (a textbook), and *International Journal of Wine Business Research*. Most board members are award-winning case writers who have published in other journals. Our production coordinator, Erin Rock, and consulting librarian, Paula Hammett, are seasoned professionals who work full-time at Sonoma State University, supported by a capable editorial and production team, consisting of current Wine MBA and Wine Business Strategies undergraduate students.

What the Editor looks for in a case

The bottom line here is engagement. Instructors and students seek multimedia or written learning materials that are free (or available for a modest cost), timely, concise, supportive of learning

goals, and unique. Classic 25+-page strategy cases that begin with a middle-aged white male pondering a decision while gazing out a window may well have gone the way of the dodo bird. Engaging students to start a discussion in any class is always a challenge. Part of our role as instructors is to give students “something to talk about.”¹

The same logic applies to the guidance we supply to prospective case authors:

- (1) **Value** — Your case should be of great value relative to the price — which happens to be free, as this is an open-source, open-access journal.
- (2) **Uniqueness** — Your case should be in a timely, i.e. in a contemporary setting — although the issues and hypotheses and theories to be applied may necessarily be timeless in nature.
- (3) **Purpose** — Your case should be decision-focused in order to support stated learning objectives — in a wine business or related course and directed to a specified level of learning.
- (4) **Impulse** — Your case should be unique or fill an as yet unmet pedagogical need — its contribution to the field of wine business research must be crystal clear.

Cases in our inaugural issue

We have selected five 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: Lindsey M. Higgins, Michael H. Lau, and Jean Dodson Peterson’s, “Risky Business: Creating a Super Luxury Estate Brand”; Michael Braun and Bambi Douma’s, “Podere Riosto: A Forchetta in the Road”; Stephen Cox’s, “A Local Pub”; Mary Barrett, Luca Gottardi, and Ken Moores’ “Planning in the Poncini Family Business”; and Raymond H. Lopez’s, “Sula Vineyards (B).” For ease of reference, the cases are summarized in the table, “Industry Digest for Volume 1, Number 1.” If you are interested in obtaining the instructor’s manuals (also known as teaching notes) from case authors, we ask that you contact them directly.

¹ Which brings to mind the song “Something to Talk About,” written by Shirley Elkhart, which became a hit for Bonnie Raitt in 1991.

Industry Digest for Volume 1, Number 1 (Spring 2016)

Case / author(s) / contact info	Company/ location (year)	Challenge(s)	Contribution(s) to learning
Risky Business: Building A Super Luxury Wine Brand Lindsey M. Higgins, Jean Dodson Peterson, and Michael H. Lau *, California Polytechnic, San Luis Obispo lhiggins@calpoly.edu	ARA Vineyards (disguised), Howell Mountain, Napa, California, USA (2016)	Price changes have costs; what are the costs associated with updating wine 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.
Podere Riosto: A “Forchetta” in the Road Michael Braun* and Bambi Douma, University of Montana Michael.braun@business.umt.edu	Podere Riosto, Emilia-Romagna, Italy (2012)	How can a small family- owned business plan for succession despite strife and economic uncertainty?	Understand complexity in a family wine business during a time of transition; evaluate impact of diversification on business model.
A Local Pub Tries To Keep Up with Changing Preferences Steven Cox* and Jim Foster, Queens University of Charlotte, North Carolina cox@queens.edu	Selwyn Pub, Charlotte, NC (2014)	What is the impact of expanding the wine list to include new, unfamiliar brands on customers and staff?	Identify revenues vs. contribution margins for each beverage category; apply Ansoff’s Product Combination Matrix to product portfolio; evaluate options to train and motivate staff to enhance wine sales.
Planning in the Poncini Family Business Mary Barrett*, University of Woolongong, Australia Luca Gottardi, and Ken Moores, Bond University, Australia mbarrett@uow.edu.au	Poncini e Santoro Azienda Agricola, Trento, Italy (2015)	Should the Poncinis remain in the wine industry, and how to make this decision?	Illustrate strategic planning processes for a family business; apply the concept of “liability of newness” to a wine business; recommend ways to reach a consensus on future direction.
Sula Vineyards (B): Sustainable Growth Raymond H. Lopez*, Pace University, New York rlopez@pace.edu	Sula Vineyards, Nashik, India (2013)	How can Sula finance growth and maintain operating control of the company, despite persistent negative cash flows?	Understand the Indian wine industry; apply tools and techniques for financial analysis, working capital, cost of capital, optimizing capital structure, and <i>pro forma</i> forecasting; evaluate pros & cons of diversification into hospitality / tourism.

*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 23.9 days — during multiple stages of review:

Julien Cadot, ISG Paris
 Julien Cusin, IAE - Bordeaux
 Marc Dressler, Hochschule Ludwigshafen
 Sharon Forbes, Lincoln U.
 Nicole Hitchcock, J Wines, founding Assistant Editor
 Margaret Naumes, U. of New Hampshire
 William Naumes, U. of New Hampshire
 Marlene M. Reed, Baylor U.
 David Rosenthal, Miami U. of Ohio
 David Rowe, Associate Editor
 Tom Ryan, U. of Cape Town
 Linda Swayne, U. North Carolina, Charlotte
 Natalia Velikova, Texas Tech / Texas Wine Marketing Institute

We plan to publish two issues per calendar year, so keep an eye out for Volume 1, Number 2, to be published in Fall 2016.

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,

A handwritten signature in black ink, appearing to read 'Armand Gilinsky', with a stylized, cursive script.

Armand Gilinsky

Founding Editor, *Wine Business Case Research Journal*

Sonoma State University Wine Business Institute

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