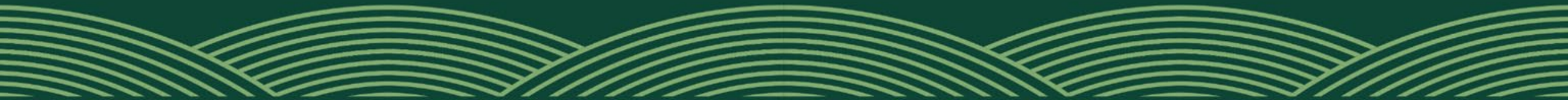




Oregon Wine
Symposium





Oregon Wine Symposium

Leading with Intention: Strengthening Culture

PROGRAM
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Oregon
Winegrowers
ASSOCIATION EST 1981

Jeff Lewis, General Manager - Revana Vineyards Winery Group

Join the Q&A

- Open the Swapcard app
- Find this session in the Program
- Click “Live Interaction” to ask questions



Recording in Progress...

Session recordings will be posted on
OWB's website by end of February

Take the post-event survey
for access to recordings
(and to help us improve OWS!)



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FARM CREDIT



Meet The Panel



Ashley DuBois Leonard
CEO and Founder
InnoVint



Jeff Lewis
Revana Vineyards
Alexana Estate



Polly Gravely
Coach & Therapist
Pinwheel Consulting



Liz Mercer
Partner, WISE
WISE

AGENDA:

Data & Diagnostics

**Leadership Behavior & Team
Dynamics**

**Building Resilience in Uncertain
Times**

Actionable Takeaways

Data & Diagnostics



InnoVint

Your Winery Operating System



WINE PRODUCTION

Run an efficient operation to save time and focus more energy on your craft.



VINEYARD TRACKING

Manage your vineyard data and set yourself up for success during harvest.



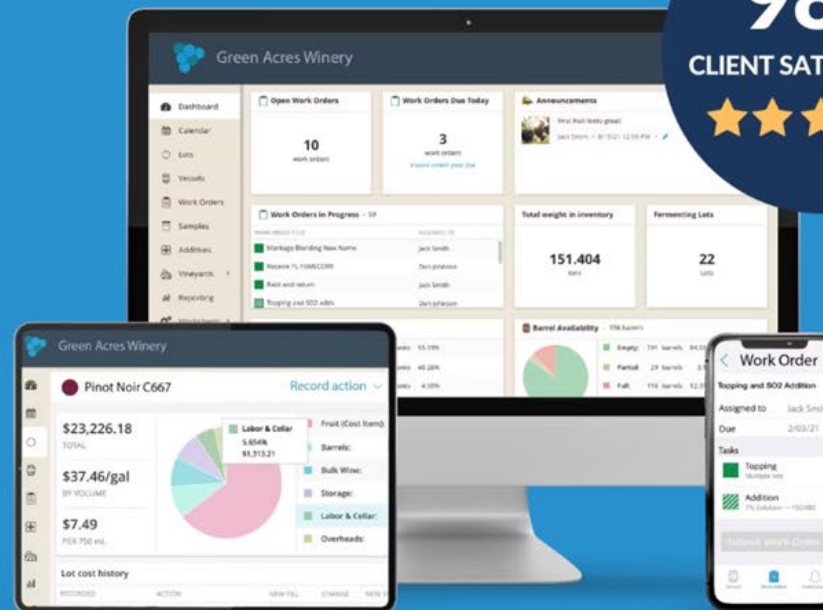
INVENTORY MANAGEMENT

Connect the dots between production and your sales channels to have a strong grasp on inventory management.



FINANCIAL MANAGEMENT

Understand to the dollar how much it costs to make each wine and easily reconcile with your accounting software.



The 5 Tenets of a Healthy Wine Business

A FRAMEWORK TO HELP YOUR WINERY THRIVE



Profitable

- Do you have a financial model, budget, and strategy with clear goals?
- Do you track financial performance, and know industry benchmarks for a winery at your size and scale?
- Do you understand your profitability per product?
- Are you sure you have enough cash to get through any unexpected turbulence?

Quick Tips

- Put cost accounting best practices in place.
- Use technology efficiently to ensure you have an accurate view of your net sales for each product sold and you properly track costs of goods sold (COGS) for each of your products.
- Plan for long-term financial sustainability.



Operational Excellence

- Are you more likely to embrace change or resist it?
- Do you have systems in place that simplify operational complexity?
- Can you improve processes to decrease bottlenecks and cost?
- Can you easily recall the production details of any wine released to market in the last seven years?

Quick Tips

- Seek ways to improve processes; eliminate operational bottlenecks and redundancy.
- Ensure every department is represented on your leadership team for strong cross-functional collaboration.
- Enforce sustainable business practices for positive impact on long-term sustainability.



Relies on Data

- What data are you collecting, and how do you share it across teams to drive decision-making?
- Are you using the best technology in each segment of your business?
- Are the decisions about which products to make based on data?
- What are the key data points that tell you whether you are successful?

Quick Tips

- Empower your team with the right tools and technology, from vineyard to production to sales to finance.
- Identify and consistently measure yourself against benchmarks, specifically against other wineries of your size and scale.



Builds a Positive Work Culture

- Are you authentic and transparent about what you value?
- How are you recognizing and rewarding your top talent?
- Are you meeting with your team often to ensure they're happy and motivated?
- Does the business have a strong vision and plan for success?

Quick Tips

- Define your values and set clear goals.
- Conduct your business with integrity, transparency and a commitment to ethical practices.
- Provide your team with the best tools, resources, and opportunities to learn new skills and advance in their careers.



Community-Centric

- Are you regularly sharing lessons learned with other wineries?
- How wide is your network? Do you intentionally seek new perspectives?
- How often do you share your experiences to help others, both positive and negative?
- In what ways are you modifying your business plan to account for your target market's preferences?

Quick Tips

- Get involved in the community by volunteering, sharing your story, mentoring, joining organizations.
- Build relationships with other wineries outside of your region to gain new perspectives on how others operate.

2025 WINE INDUSTRY BENCHMARK REPORT

State of Winery Health Report

Insights to help you measure, compare, and strengthen your wine business health – *financially, operationally, and culturally.*



innovint.link/report-ows



5 Ways Cultural Health Impacts Operational & Financial Health

1. Stronger Operations

Wineries with excellent operations rated their culture as “exceptional” or “great” 94% of the time. On the flip side, 71% of those with poor operations called their culture “toxic.”

2. Higher Technology Adoption

Among wineries that rated themselves far above average in tech adoption, 88% also rated their culture positively, compared to just 47% among those behind the curve.

3. More Data-Driven

Data maturity matters—88% of data-forward wineries rated their culture positively vs. 56% of those below industry average.

4. Better Sales Performance

Wineries with upward-trending sales were much more likely to report a healthy culture (82% vs. 63% among those with declining sales).

5. Greater Pricing Confidence

Culture was robust among wineries who were confident in their pricing strategy — 93% of that group also reported great culture.

5 Dysfunctions of a Team

High Performance Team

Dysfunctional Team



THE EOS MODEL[®]

The EOS Model provides a visual illustration of the Six Key Components™ of any business that must be managed and strengthened to be a great business. This model applies to big and small businesses alike, in any industry.



Leadership Behavior & Team Dynamics

“The financial cost of having an unhealthy organization is undeniable: wasted resources and time, decreased productivity, increased employee turnover, and customer attrition...”

People who work in unhealthy organizations eventually come to see work as drudgery.”

- Patrick Lencioni, *The Advantage*
Why Organizational Health Trumps Everything Else in Business

Leadership Behavior & Team Dynamics

Building Resilience in Uncertain Times

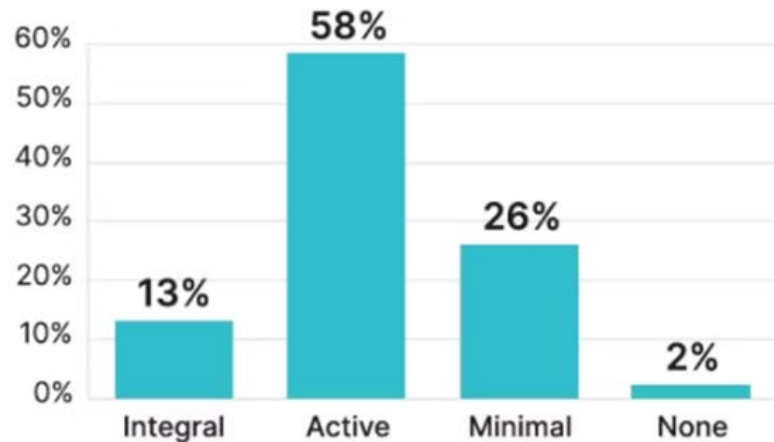


3x more likely to be profitable.



3x more likely to report increasing sales.

How would you rate your winery's overall involvement in the community?



- Smaller wineries more likely to report higher community involvement.
- Owners and GMs reported highest personal involvement.
- Winemaking staff are least personally involved in community.

Building Resilience in Uncertain Times

How to Keep Your Team Aligned Weekly

Run Meetings That Actually Work

Weekly. Same Day. Same Time.

- Predictable cadence (create *muscle memory*)
- Respects everyone's time (*give everyone a seat at the table*)

Agenda-Driven

- **Scorecard** (*define your leading indicators/KPIs - How We Score What Matters?*)
- **Rocks** (*on / off track*)
- **Issues List** → **Solve, not discuss**
- **Clear To-Dos** with owners

Issues Over Updates

- Surface problems early
- Solve together, not sideways

Actionable Take Aways

Perform a Culture “Checkup” (Audit)

Step 1: Assessing Intentionality (10 questions - yes/no)

- *Do you have clear Core Values – are they communicated regularly ?*
- *Our company mission and vision are well-defined and well-known by everyone ?*
- *Our company has defined processes for every aspect of our operations ?*
- *Our company has clearly defined roles and responsibilities ?*
- *There are performance metrics for every employee, aligned with our company’s goals.*

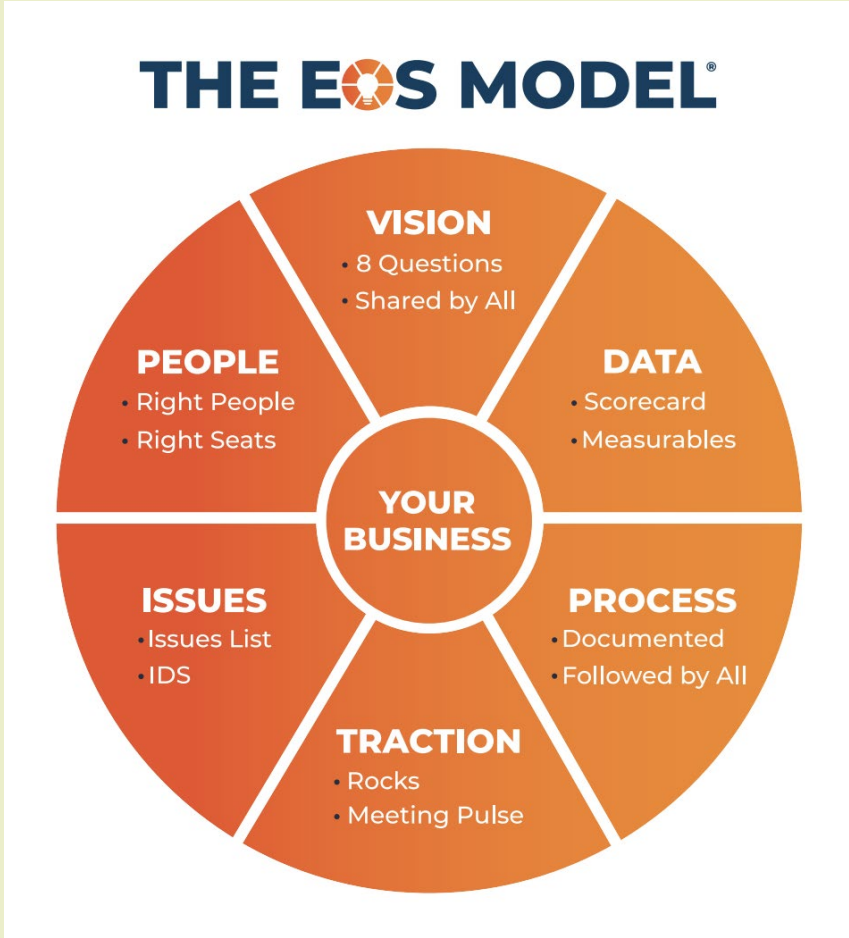
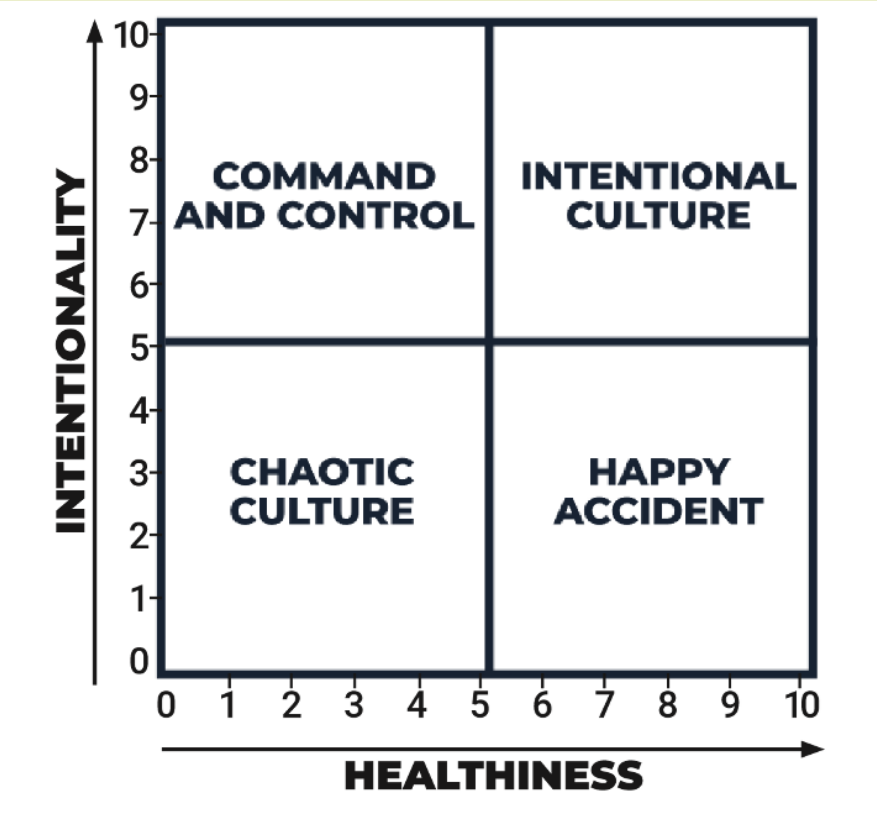
Perform a Culture “Checkup” (Audit)

Step 2: Assessing Healthiness of Employee Culture (10 questions - yes/no)

- *Our employees feel appreciated and acknowledged for their work ?*
- *Our company promotes open communication and constructive feedback ?*
- *Our company believes in teamwork and fosters a sense of community and belonging ?*
- *Our employees feel empowered to make decisions in their areas of work ?*
- *Our employees are generally happy and motivated to work ?*

Perform a Culture “Checkup” (Audit)

Your Score:



Employee Satisfaction Survey



1. Do you know what is expected of you at work?
2. Do you have the materials and equipment to do your work correctly?
3. At work, do you have the opportunity to do what you do best every day?
4. In the last seven days, have you received recognition or praise for doing good work?
5. Does your supervisor, or someone at work, seem to care about you as a person?
6. Is there someone at work who encourages your development?
7. At work, do your opinions seem to count?
8. Does the mission/purpose of your company make you feel your job is important?
9. Are your fellow employees committed to doing quality work?
10. Do you have a best friend at work?
11. In the last six months, has someone at work talked to you about your progress?
12. In the last year, have you had opportunities to learn and grow?



Actionable Take Aways

Q&A



Ashley DuBois Leonard
CEO and Founder
InnoVint



Jeff Lewis
Revana Vineyards
Alexana Estate



Polly Gravely
Coach & Therapist
Pinwheel Consulting



Liz Mercer
Partner, WISE
WISE

Let's become the leaders our wine community & organizations need!



Polly Gravely

www.pinwheelconsulting.com/resources

Build a Healthy Culture
Resources

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innovint.link/report-ows

Liz Mercer, *Partner*

WISE

Liz@WineIndustrySalesEducation.com

ADDENDUM

Real-World Culture Toolbox

10 TOOLS for WINERY LEADERS

*Lessons learned building and scaling a purpose-driven culture
for sustainable growth that attracts and retains talent.*

REVANA VINEYARDS - Argentina, Napa and Oregon

Lesson 1: The Culture Audit

Objective:

To Gain Clarity on the state of your organizational culture

Action:

Complete **'Culture Checkup'** – **'EOS/Traction'** *by Gino Wickman*

THE EOS MODEL®

The EOS Model provides a visual illustration of the Six Key Components™ of any business that must be managed and strengthened to be a great business. This model applies to big and small businesses alike, in any industry.



Lesson 1: The Culture Audit

Objective:

Understand and learn how to **diagnose team dysfunction**

Action:

Read '[The Five Dysfunctions of a Team](#)' *by Patrick Lencioni*

5 Dysfunctions of a Team

High Performance Team

Dysfunctional Team



Perform a Culture “Checkup” (Audit)

Step 1: Assessing Intentionality (10 questions - yes/no)

- Do you have clear Core Values – are they communicated regularly ?*
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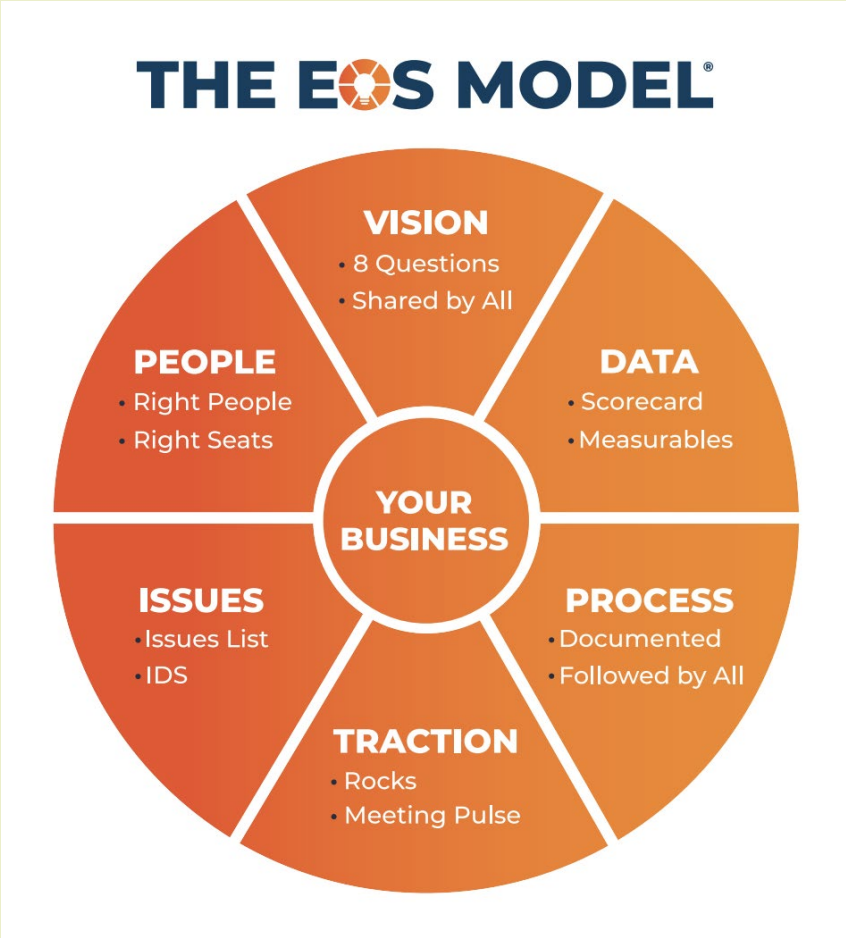
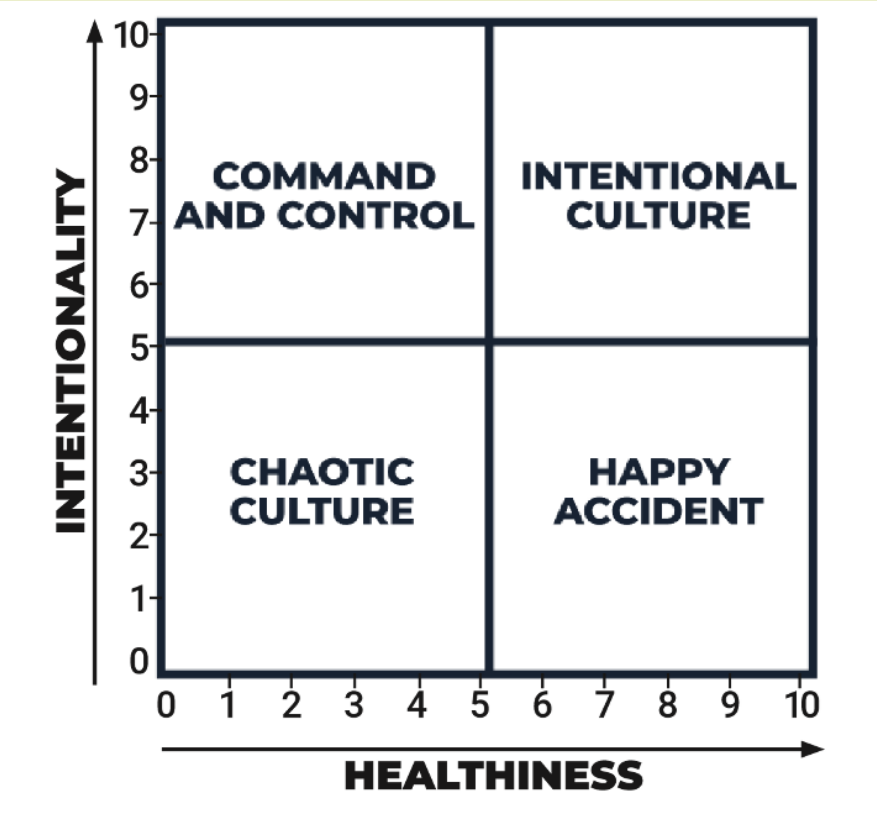
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- *Our employees are generally happy and motivated to work ?*

Perform a Culture “Checkup” (Audit)

Your Score:



Core Values as an Operating System (EOS)

Create 3-7 Core Values that are clear enough to teach and coach

1. Already Alive

- Discovered, not invented
- Observed in your best people

2. Behavioral

- Describes *how we act*
- Not vague aspirations

3. Non-Negotiable

- Used in hiring, reviews, and exits
- Protects culture under pressure

Revana Core Values



Three Estates Shared Values, Mission, & Vision

This document is intended to formally communicate the shared vision, mission and core values of our company, our founder, leadership and the wonderful team members that have helped build our reputation as a TOP 100 luxury wine brand.

These are the guiding principles that drive our daily operations, strategic planning and overall decision-making process from hiring team members that share these values to promoting, rewarding and growing those within our organization.

We are all part of an evolving legacy with lofty ambitions that require unity and cohesion in our daily work, we hope these values become tools to guide you in your roles, responsibilities and relationships.

REVANA VINEYARDS Brand Core Values

Our team aspires to continue elevating the legacy built on uncompromised quality and authenticity by incorporating the following values throughout all aspects of our business, farming, hospitality and winemaking.

REVANA VINEYARDS Vision Statement

Our Estates each will be universally recognized by collectors, wine writers and our peers alongside the elite wine estates in the world.

Independently and as a group, we are focused on producing wines and experiences that become the destination within our wine communities.

Motivated by the visionary legacy of founder Dr. Madaiah Revana, our culture has cultivated a team of thought leaders in the areas of farming, winemaking, hospitality and wine business that are unified in their dedication to produce exciting wines and experiences of extraordinary quality.



Lesson #2 – Define Core Values

REVANA VINEYARDS

Brand Core Values

Our team aspires to continue elevating the legacy built on uncompromised quality and authenticity by incorporating the following values throughout all aspects of our business, farming, hospitality and winemaking.



DRIVEN BY EXCELLENCE: Undertake all we do with intent of excellence, including vineyard practices, winemaking, hospitality, client communication and company management.



TRANSCEND THE STATUS QUO: Respect the knowledge from those before us, while actively pursuing innovations in our winemaking, viticulture and business.



ENGAGE AND INSPIRE: Our knowledge and passion will develop high trust relationships that will inspire each other, our community and those with whom we connect.



COMMITMENT TO RELATIONSHIPS: Seek, develop and maintain meaningful relationships with our peers, guests, and members of our respective communities by sharing our knowledge, listening, and acting in our collective best interests.



SUPPORTIVE ACCOUNTABILITY: Support and encourage accountability in each other and ourselves through proactive problem-solving. Fostering a positive and empowering work environment to build momentum towards excellence.



HEALTHY LAND AND WATER: Practice thoughtful stewardship of our lands and waterways through regenerative and organic agriculture, responsible water use and environmental preservation.

Purpose + Mission Must Be *Lived*, Not Just Stated

Core Values are embedded in everyday systems as decision filters

If Values Don't Cost You Anything, They're Not Real

- Hiring
- Performance Reviews
- Promotions
- Terminations
- Strategic Decisions

GWC – The People Analyzer

Are your people in the right seats?

G — Get It

- Understands the role and expectations
- Sees how their work fits the whole

W — Want It

- Wants the responsibility *and* the accountability
- Motivated by the work, not just the title

C — Capacity

- Has the time, skills, and emotional energy
- Can grow into what the role requires

‘Right People’ build trust – ‘Right Seats’ drive results.

Two Separate Questions Leaders Must Answer

- **Right People**
 - Share our core values
 - Behave the right way under pressure
- **Right Seats**
 - Clear roles and expectations
 - GWC: Get It • Want It • Capacity

Purpose is the currency of success in today's workplace

- **Purpose is** foundational to how work gets done and how people connect to meaning in their roles.
- **Purpose allows** People to connect to a *tribe and meaning*, not just tasks.
- **When purpose is clear and real, work becomes meaningful**

Culture Is Caught, Not Taught

- What you **tolerate** becomes the standard
- What you **reward** gets repeated
- What you **avoid** spreads quietly
- Pressure reveals the **real norms**

Company Rocks (Quarterly - 90-day Focus)

Define what matters most *now*

Create 90-Day Rocks for your team

- 3–7 priorities that matter most
- Set quarterly by leadership and team
- Clear owner and finish line

Accountability

- Reviewed weekly
- Public, not personal
- Done or not done

Culture is what remains when the playbook runs out!

Culture Reveals Itself When...

- Decisions get hard
- Pressure increases
- Information is incomplete
- Time and resources are tight



REVANA
VINEYARDS



 **401k**

 Oregon Wine Symposium