



Wine Business Case Research Journal

Vol. 3, No. 1

Editor's Note and Industry Digest

Welcome back to the *Wine Business Case Research Journal (WBCRJ)*. 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.

In early September 2019, *WBCRJ* has been whitelisted in Cabells, a curated list of over 11,000 academic journals spanning 18 disciplines to guide researchers and institutions in getting the most out of their research.

Our production coordinator, Sarah Hehman, and consulting librarian, Rita Premo, are seasoned professionals who work 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; and,
- 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 audio/visual equipment);
- 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); and,
- 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 third volume

We have selected three outstanding cases and one applied research paper that reflect a diversity of topics and regions and that represent a range of viewpoints regarding the current state of wine business research and practice. Taken together, these contributions advance our knowledge of how wineries weigh the challenges of becoming innovative and sustainable in order to achieve differentiation advantages in the marketplace.

They are: Sharon L. Forbes and Khalid Alsulaiman’s “Cloud-Based Computing: Providing an Advantage to a Small New Zealand Wine Business”; Emilio Tedeschi’s “Cypress Lane Estate: Human or Mechanical Harvesting?”; Jean Dodson Peterson, Forrest Richmond, Adrienne Ferrara, Katharine Watts, and L. Federico Casassa’s “The Longevity of Sustainable Vineyard Practices”; and Rosana Fuentes Fernández’s “Finding Common Ground: The Need for Cooperation and Collaboration in the Spanish Natural Wine Industry.” For ease of reference, the cases are summarized in the table, “Industry Digest for Volume 3, 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 3, Number 1 (Fall 2019)

Case/author(s) contact info	Company/location (year)	Challenge(s)	Contribution(s) to learning
<p>Cloud-Based Computing: Providing an Advantage to a Small New Zealand Wine Business Sharon L. Forbes* & Khalid Alsulaiman, Lincoln University, New Zealand [sharon.forbes@lincoln.ac.nz]</p>	<p>Wooldale Estate (disguised), New Zealand, (2018)</p>	<p>How a cloud-based CRM software tool is used to provide a competitive advantage for a small winery</p>	<ul style="list-style-type: none"> • Identify and select cloud-based software programs to gain efficiencies • Understand challenges in CRM implementation • Use CRM software to build brand loyalty and facilitate a one-to-one targeting strategy

*Contact Person

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<p>Cypress Lane Estate: Human or Mechanical Harvesting? Emilio Tedeschi*, Sonoma State University, United States [emiliotedeschi@gmail.com]</p>	<p>Cypress Lane Estate (disguised), Lake County, California, USA (2018)</p>	<p>How to manage vineyard holdings sustainably in the face of a shrinking and increasingly costly labor force</p>	<ul style="list-style-type: none"> • Identify strategic decision-making process for vineyard growth strategies • Weigh sustainable approaches to vineyard management • Analyze operating data pertinent to current vineyard operations and proposed scenarios • Perform cost benefit analysis for various strategies pertaining to vineyard expansion
<p>The Longevity of Sustainable Vineyard Practices Jean Dodson Peterson*, Forrest Richmond, Adrienne Ferrara, Katharine Watts, & L. Federico Casassa, California Polytechnic State University, United States [jdodsonp@calpoly.edu]</p>	<p>ARCH Vineyards (disguised), Central Coast, California, USA (2018)</p>	<p>How to assess increased out-of-pocket costs of farming ‘sustainably’ and the attendant impact on the winery’s brand positioning</p>	<ul style="list-style-type: none"> • Determine the value of SIP Certification to a vineyard and as a marketing commitment • Understand how SIP Certification impacts customer and consumer purchasing decisions in the 3-tier distribution and direct-to-consumer channels, respectively • Generate action items for the wine industry to remedy customer and consumer confusion over environmentally sensitive farming standards and labeling

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<p>Finding Common Ground: The Need for Cooperation and Collaboration in the Spanish Natural Wine Industry Rosana Fuentes Fernández*, Universidad San Jorge, Campus Universitario Villanueva de Gállego, Zaragoza, Spain [rfuentes@usj.es]</p>	<p>Alfredo Maestro, Bodegas Garay, Constantina Sotelo, MicroBio, and Puerta del Viento Organic Wines, Spain (2019)</p>	<p>How cooperation and collaboration among Spanish natural wine producers would contribute to knowledge sharing, innovation, and consumer education in the sector</p>	<ul style="list-style-type: none"> • Develop a deeper understanding of the opportunities and challenges facing the emerging natural wine segment • Generate action items to mitigate the difficulties in growing natural wine grapes, the high costs associated with natural winemaking, consumer resistance to natural wines, and grow brand awareness in Spain and internationally • Weigh the pros and cons of co-opetition strategies to achieve both individual and collective goals

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Special thanks to the 11 expert reviewers (listed below), who provided developmental feedback to contributing authors—with an average review return cycle of 21.1 days (!)—during multiple stages of review:

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Julien Cusin, IAE Bordeaux, France
Sharon Forbes, Lincoln University, New Zealand
Sandra Newton, Sonoma State University, USA
Jean Dodson Peterson, California Polytechnic, USA
Marlene Reed, Baylor University, USA
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Natalia Velikova, Texas Tech University, USA

We aim to publish one issue per calendar year, so keep an eye out for Volume 4 to be published in Spring 2020.

For information on submitting your case, go to:
<http://sbe.sonoma.edu/winebiz/wine-business-case-research-journal>

Our Scholastica case submission portal can be found at:
<https://wbcrlj.scholasticahq.com/for-authors>.

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', written in a cursive style.

Armand Gilinsky
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