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Heritage District Panel Questions

Discussion Topics for Upcoming
Session

Heather Daenitz

Heather Daenitz is a wine industry photographer and marketing strategist based in Santa Barbara Wine Country. Through her business Craft & Cluster, she helps wineries connect with audiences through behind-the-scenes storytelling and practical DTC marketing. Her work has appeared in Wine Business Monthly, Sunset, Decanter, and more, and she was named 2025 Wine Photographer of the Year by the World Food Photography Awards.



Kyle Lerner



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James Lovaas

James is the DTC Operations Manager for Wente Family Estates and Murrieta's Well. He has worked in winery hospitality and operations in California since 2017. Before moving to California, he spent more than 15 years in marketing and training roles and served as the director of corporate training for a private midwestern university.

Patricia O'Brien

A seasoned hospitality and DTC leader with 16+ years in the California wine industry. As Director of Hospitality at Truffle Pig Winery, she leads tasting room operations, wine club strategy, marketing, guest experience, and team development—turning SOPs into culture-driven training that scales. A WSET Level II certified professional and long-time DTC Wine Symposium Steering Committee member, Patricia is known for building high-performing teams, data-driven growth, and experiences that convert guests into loyal advocates.

Robyn Sebastiani

Executive Director, Sonoma Valley Vintners & Growers Alliance

Co-Founder of West Shore Wine Company

- As executive director, she champions the region's rich heritage while driving the evolution of its modern direct-to-consumer landscape through regional storytelling and high-impact community initiatives.
- Co-founder of West Shore Wine Co, forging path for alternative wine formats
- 17-year award-winning career in sales leadership at Pfizer and Medtronic.
- MBA from Sonoma State University; B.S. in Marketing from Santa Clara University.
- Mother of 8 year old twin girls, married to my wonderful husband, Chris, Sonoma resident, tennis player—still a loyal (and brave) Dodger fan in Giants territory.



How You Got There

- Beyond a general need for better marketing, what is the single most critical, quantifiable challenge an assessment must solve for your region?

How You Got There

- In this process, how did you involve ancillary organizations and/or boards?
- Please talk about working with county supervisors and/or other governmental principals.

How You Got There

- Please talk about working with or converting those that opposed, or initially opposed, the assessment.

How You Got There

- What was the tipping point that secured a majority vote this time, after the previous attempt failed?

How You Got There

- For Sonoma, the public debate was intense. What was the cause of this intensity?
- What value did the public comment and discussion phase ultimately bring to the process, even with its heat?

Questions

How You Structured It

- How does the assessment model (e.g., a percentage of DTC sales) ensure that a small winery and large wineries are fairly represented?

How You Structured It

- The Livermore Valley uses a 2% assessment on Direct-to-Consumer (DTC) sales, while Lodi is proposing 1.5%. How did you determine the 'magic number' that is sufficient to fund ambitious goals yet small enough to avoid significantly impacting the consumer or the winery's margin?

How You Structured It

- In a highly fragmented industry, how do you successfully create a unified brand message that benefits every winery, from a large destination producer to a small, family-run boutique, without alienating either?

How You Structured It

- Please speak to the need for well structured plan at the beginning of the process.
- What professionals should be involved early on in the planning process?

How You Structured It

- What specific financial accountability mechanisms are in place to ensure all wineries, especially those who opposed the formation, feel confident that the collected funds are being managed transparently and spent on programs with clear benefit?

Questions

How You Measure Success

- What is the primary metric your assessment uses to define success: is it total visitor volume, DTC revenue growth for the region, media impressions, or something else entirely?
- What additional metrics are you measuring?

How You Measure Success

- After several years and iterations, what was the most significant program or spending has delivered a return on investment?

Lessons Learned

- If an audience member is considering exploring this model for their own AVA, what is the single most important piece of advice you would give them before they even hire a consultant?

Questions



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