



SOUTHERN OREGON  
WINE INSTITUTE

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### **SOUTHERN OREGON WINE MARKETING & SALES CONFERENCE**

#### **SPEAKER BIOS**

##### **Dixie Huey**

Trellis Wine Consulting; Vancouver, Washington  
[dixie@trelliswineconsulting.com](mailto:dixie@trelliswineconsulting.com) (360) 210-5551

Dixie Huey has successfully guided over 50 wineries ranging from smaller operations like Calera and Joseph Phelps to international businesses including Symington Family Estates and Diageo. Her depth of expertise and strategic focus provide valuable insight on the need for measurable return on marketing investment. Huey has worked as a buyer, wine marketing instructor, traveled extensively to world wine regions, and is a frequent panelist, business writer and competition judge. She holds a Master of Business Administration in finance and the advanced certificate from the Wine & Spirit Education Trust. Born in North Carolina, she was graduated cum laude with an AB in psychology and a minor in French from Duke University.

##### **Richard Roberts**

Palazzo Creative; Seattle, Washington  
[Richard@palazzocreative.com](mailto:Richard@palazzocreative.com) (206) 328-5555

Richard Roberts is the co-founder, president, and creative director of Palazzo Creative. Palazzo is a 21-year old creative agency that advises businesses and organizations on how to extend their brand into the social web and use innovative social media marketing solutions to build relationships, acquire and retain customers. Richard has developed brand strategy and marketing communications solutions for more than 150 clients in technology, hospitality, healthcare, life sciences, and more. His ability to make a deep connection with audiences, combined with his extensive knowledge of traditional and new media, gives Richard an unparalleled ability to develop creative strategies and executions that exceed expectations. He has been the recipient of over 100 industry awards, including an Emmy, for his marketing and advertising work, is one of the founders of the Broadcast Designers Association, and has had his articles and white papers published worldwide in many industry journals and websites.

##### **Sheila Nicholas**

Anam Cara Cellars and Nicholas Communications; Newberg, Oregon  
[sheila@nicholascommunications.com](mailto:sheila@nicholascommunications.com) (503) 537-9150

Possibly the most “vertically-integrated” person in her field, Sheila Nicholas has her own vineyard, wine, a PR firm representing some of the top names in the Oregon wine industry, and a nationwide network of sales and marketing associates. She has firsthand

experience in all the pleasures and pitfalls of growing, making, selling and promoting wines for herself and her clients. Over the course of 20 years in wine industry communications, Sheila has developed effective marketing programs and delivered results for winery clients from large, multi-faceted international brands to highly specialized boutique producers. Today, her attention has narrowed to wineries and wine-related businesses in the Pacific Northwest, with a particular focus on Oregon. Proudly serving on numerous industry boards and committees, Sheila has a finger on the pulse of the industry. She has been a member of the Oregon Wine Board Marketing Committee, the Classic Wines Auction Procurement Committee, the Oregon Wine Marketing Network, the Newberg Chamber of Commerce and the Willamette Valley Tasting Room Managers Network. Her credo? Don't waste anyone's time, and what's good for Oregon, is good for Oregon.

### **Jeanette Morgan**

Oregon Wine Board; Portland, Oregon  
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Jeanette Morgan is the Executive Director of the Oregon Wine Board (OWB), the Oregon Winegrowers Association (OWA), and the Trust for Oregon Wine Education and Research (TOWER). She is responsible for broad-based strategic leadership and strategic planning and administration of the Board of Directors and its committees and constituencies, helping to establish consensus and encourage collaboration amongst the various sectors of Oregon's grape and wine industry. In addition, she serves as a liaison with other partners on promotions, advocacy, research and educational organizations. Jeanette brings robust experience in strategic leadership and government affairs, most recently as Vice President of Global Government Affairs of National Semiconductor Corporation in Santa Clara, Calif. When not working in the public policy arena, Jeanette enjoyed working in the wine industry at Santa Barbara Winery, as a volunteer at Arrowood Winery and assisting several winery owners in Sonoma County with harvests, tasting room visitors and tours. Jeanette received her undergraduate degree in Political Science/Public Service from the University of California, Santa Barbara, and an Executive MBA degree from Stanford University.

### **Terry Miller**

CRM Group; Redmond, Washington  
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Terry Miller has more than 25 years of experience in sales, marketing and operations. He is the founder and current managing partner of CRM Group near Seattle, a consultancy specializing in development and deployment of customer acquisition, retention and service strategies. Among CRM Group's clients are Adobe Systems, ShareBuilder and Penner-Ash Wine Cellars, where his firm was responsible for creation of the winery's online store, plus management and implementation its email marketing strategy. Previously, Terry was executive vice president and founding member of [Mercata.com](http://Mercata.com), where he was responsible for all aspects of site content and design,

marketing, merchandising, operations and customer service for this top-rated e-commerce company. Also, Terry has held senior management positions at Asymetrix Corporation, Softbank Services Group, Gupta Corporation and Broderbund Software. He earned a B.A. in journalism at the University of Minnesota.

## **Jeffrey Kingman**

Chalkboarder, Portland, Oregon

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Jeffrey Kingman is CEO of Chalkboarder, which specializes in relationship engineering, social media/networking, digital community management and brand/concept development for all categories of organizations. With 30 years experience encompassing commercial, non-profit and military segments across North America, participation in several startups and strategic brand/concept development, Jeffrey brings vision, broad strategy and managerial abilities to lead Chalkboarder into position as a leading provider of growth strategies and resources to diverse organizations. Extensive team-leadership experience in the hospitality sector (the second-largest industry in the USA) and collaborating with a wide range of organizations throughout his career brings to clients insight, understanding and creative solution-making. Jeffrey has been communicating online since the first days of AOL and Yahoo, started his first blog on local northern New England politics in 2004, has experience in managing political and issue campaigns and is extensively studying the growing impact of technology and social media on organizations from an management and human resource perspective. Driven, often working 14+ hour days six days a week, he is continually sifting and mining the latest in social media, sustainability, hospitality, economics and national affairs.

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## **Christine Collier**

Southern Oregon Wine Blog, Long Story Short Cellars, and Troon Vineyard

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Christine is an Oregon girl making wine, selling wine, writing wine, and of course, drinking wine. She graduated from Oregon State University with a Bachelor's of Science in Entrepreneurship in 2010. During her senior year of college, Christine worked as the Social Marketing Coordinator for one of Oregon's largest wineries, Willamette Valley Vineyards. Christine used her Millennial status and online savvy to pioneer new ways to connect with consumers and trade. While at WVV, Christine was introduced to Southern Oregon wines and immediately felt a need to help promote this region. She started The Southern Oregon Wine Blog and continues to contribute bi-weekly to the site. Most recently, Christine has partnered with her winemaker boyfriend to launch their own wine brand, Long Story Short Cellars. Currently, Christine works as the Marketing & Events Coordinator at Troon Vineyard in the Applegate Valley.

## **Paula Caudill**

Abacela; Roseburg, Oregon

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Paula Caudill has worked in the Northwest wine industry for more than 13 years. A graduate of the University of Washington, she began her career in retail wine sales in downtown Seattle. A move back to her home state of Oregon led to a job at Abacela in 2002. Working with direct sales, marketing, social media, branding, and distribution, she has helped keep Abacela at the front of the pack. She also volunteers for the Umpqua Valley Winegrowers Association, serves on the Greatest of the Grape Committee, designs websites for local businesses, and gives her time to help others just starting out on their wine journey.

## **Josh Bradley**

Shop Dragon; Ashland, Oregon

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Josh Bradley is the president of ShopDragon, an eCommerce platform designed to serve the needs of small businesses in order to help make more vibrant community economies. Josh has spent 16 years in technology and marketing, putting him in diverse environments spanning everything from community building to eco-friendly plastic development. His experience includes working with some of the nation's largest companies to develop products, increase effective corporate communication, create brands, and decrease environmental impact. In 2008, he joined with his partner Robert Head to take their collective knowledge about marketing and eCommerce to develop ShopDragon, a software platform that empowered small businesses and helped them to become more profitable using the incremental sales potential of the Internet.

## **Carole Stevens**

Folin Cellars and Carole Stevens Consulting, Sherwood, Oregon

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Carole began her career in the Oregon wine industry over a decade ago. Focusing on direct-to-consumer relations, Carole has worked for some of Oregon's most reputable wineries including, WillaKenzie Estate, Domain Serene and Solena Cellars. She is the founder of Carole Stevens Consulting, providing wine marketing expertise to start-up and established wineries, as well as implementing winery-based events such as Carlton's Walk In The Park. Carole currently serves as the Sales and Marketing Director for Folin Cellars in Gold Hill, Ore. A native Oregonian, Carole grew up on a farm in the Northern Willamette Valley. She has a B.S. in Political Science from Whitman College in Walla Walla and an M.S. in Agriculture from Montana State University, Bozeman. She lives in Sherwood, Oregon with her son and a hodgepodge of pets.