

THE ROAD TO EQUITY PASSES
THROUGH ROI

Yup! It's Not A Straight Line

In A Rapidly Changing Landscape Do You Own Your Equity?

ROI makes predictions while
ROE indicates effectiveness

CURATO | *You Can Measure Success*

CuratoCo.Com

INTRODUCTION

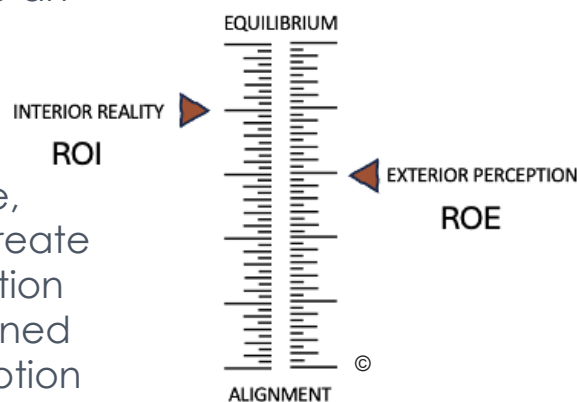


PUT YOUR
PRINTS ON
YOUR
BUSINESS...



Making your mark is a passion; turning that expectation into an intentional purpose, product, or experience that will leave an indelible stamp is only possible with structure and a planned strategy.

Alignment is essential as you look to produce, promote, and sell your wine, craft spirits, or destination venue to create engagement. You will require innovation and alternative methods and an aligned interior reality with the exterior perception of your business. Your role in this process is crucial, and here are some ways the Curato Guild of Advisors would like to assist you in this journey.

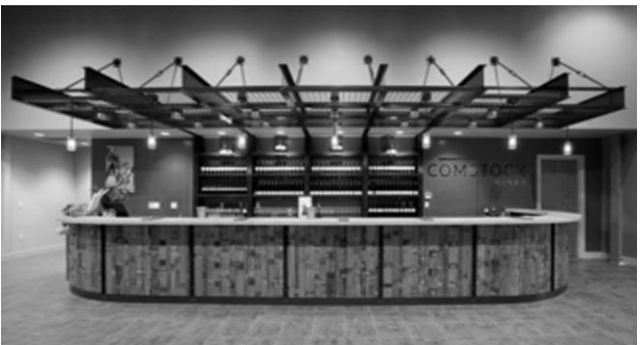


FRACTIONAL

Fractional leadership services generally refer to part-time or on-demand expert assistance, often in areas like finance, marketing, or legal, that a business might engage instead of hiring a full-time employee. This allows stakeholders to access specialized expertise without the full-time cost or commitment. It is not about buying time with old ideas, it is experience-based innovation that will ensure longevity

DISCOVER IDEAS THAT GENERATE REVENUE + DRIVE VALUE
NURTURE STORY-DRIVEN INSIGHT + CONCEPTS + EXPERIENCES
ACTIVATE AWARENESS + MARKET ENGAGEMENT + LOYALTY

ROE VS ROI 25



SHARE

We coach individuals and businesses on how to envision, revision, or revive their ideas. We then advise or mentor them on bringing those ideas alive – It is the art of turning passion and expectation into a *greater than* purpose and intention with clarity of a promise, where **ROI** makes predictions while **ROE** indicates effectiveness.

CREATE

– *it's that simple...*

Our focus is to support winery and distillery owners, executives, and teams with the expertise they need to grow their businesses by creating consumer awareness of their brands and products.

CRAVE

Your access to our Curato Guild, which offers in-person advisory sessions or self-paced online workshops, is designed to focus on discovering ideas that generate revenue and drive equity. We nurture story-driven insights, concepts, and experiences that activate awareness, drive market engagement, and foster customer loyalty to boost sales.

IMAGINE

“True creativity is the ability to connect the seemingly unconnected with a simplicity that works in complex situations.”

ROE VS ROI 25

TRADITIONALLY, businesses and projects were managed using three metrics. Time, Cost, and Quality to achieve an ROI.

HOWEVER, there is a fourth element of **equity** that is required to achieve the desired ROI (Return on Investment) when balancing these aspects of a business.

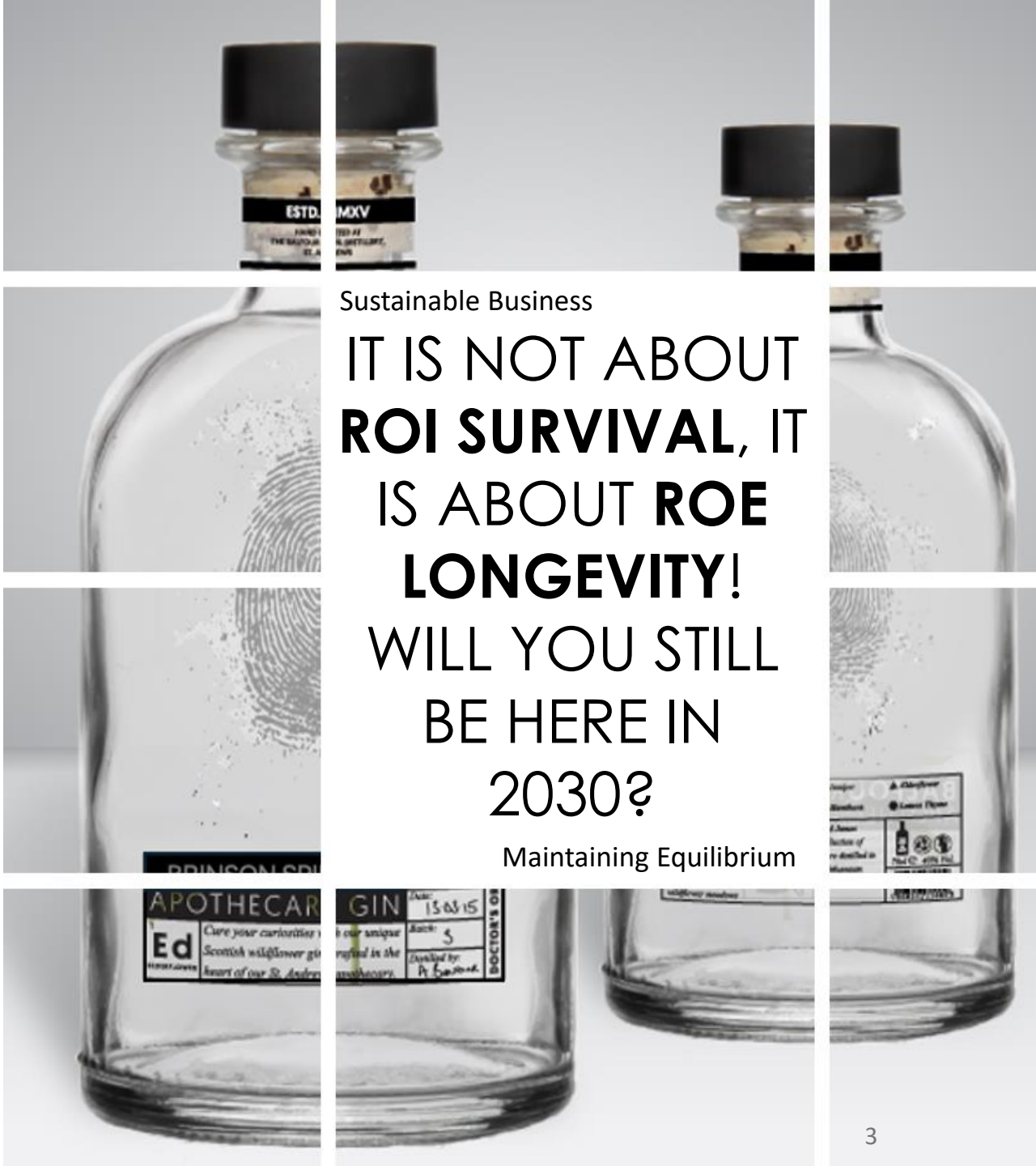
CONSIDER ROE in an evolving or pivoting marketplace. Who is measuring the results or outcomes of all the changes for longevity and prosperity?

ROI (*Return on Investment*) is primarily a predictive metric. It helps wineries and distilleries forecast the potential returns from specific investments, such as opening and operating a tasting room, launching a marketing campaign, or making vineyard improvements. ROI guides strategic choices by weighing costs against anticipated benefits and is often used to evaluate the financial viability of specific initiatives. Time, Cost & Quality only.

ROE (Return On Equity), on the other hand, reflects the effectiveness of a company's overall use of its equity capital to generate profits. In the beverage and hospitality industry, a high Return on Equity (ROE) indicates that a business is efficiently leveraging its assets, intellectual property, facilities, brand reputation, customer relationships, and perceptions to sustain profitability, growth, and long-term success.

The Silicon Valley Bank (SVB) wine reports project a period of industry correction, with a return to flat growth expected around 2030. This projection is tied to the demographic shift in wine consumption, specifically the declining influence of the baby boomer generation and the failure of younger generations to fully replace their purchasing power. In essence, the 2030 projection represents the point where the industry is expected to stabilize after a period of decline, but not necessarily enter a phase of robust growth. The industry's ability to adapt to changing consumer preferences and attract younger drinkers will be crucial for future success.

ROE VS ROI 25



Sustainable Business

IT IS NOT ABOUT
ROI SURVIVAL, IT
IS ABOUT **ROE**
LONGEVITY!
WILL YOU STILL
BE HERE IN
2030?

Maintaining Equilibrium



INTRO

IMAGINE

CRAVE

CREATE

START NOW!

You can begin with a **complimentary** 30-minute **Zoom call** and our simple **PULSE** Survey to let us know what idea **BRINGS YOU ALIVE**. So that you can **BRING IT TO THE TABLE**

Book A Zoom

<https://paperbell.me/curatoco>

DISCOVER | Coaching for executive leadership, exploring the ideation and the development of business viability. Peer review for fractional support and expanded planning through a **PULSE** exercise

- Brand Essence & Identity Audit
- ROI & Cashflow Review
- Sales & Distribution Evaluation
- Product Review and Testing
- Leadership Evaluation

NURTURE | Advising for a project team or group exploring the transition of an idea into a fully fledged business, leveraging assets, capability, and ideas into strategy using an **EVOKE** roadmap plan.

- Management & Leadership
- ROE Development Mapping
- Marketing & Media Content
- Broker & Distributor Outreach
- DTC & Hospitality Facility Review

ACTIVATION | Mentoring support to **implement** strategy, brand, sales, and marketing leadership positioning and capability. Binging business development into full **OPUS** expression.

- Broker & Distributor Management
- ROO Measurement & Tracking
- DTC & Hospitality Training & Launch
- Product & Packaging Creative
- Architecture & Interior Design



Gary Finnan - Creative Expression Advisor

Gary is an award-winning inspirational author, designer, entrepreneur, and creative expression advisor. He utilizes a depth of experience gained in the design, destination, and hospitality industries in Africa, Europe, Asia, and the United States to bring a fresh cross-industry and global perspective to any creative project using a proprietary Evoke process.

Gary is excited to explore and leverage brand, technology, and design tools to inform, educate, and communicate for meaningful change and growth across leadership teams and experience-based organizations.

Gary has taught at Sonoma State University Wine Institute and has developed luxury destination wineries, distilleries, and hospitality destinations for existing and emerging brands. He is a sought-after business coach with a down-to-earth, story-driven, and humorous style. He is motivated not only to inform and inspire but also to leave clients and business teams with tangible, actionable ideas, strategies, and practices proven to make a difference in both work and life.



Van P. Potts – Sales + Business Advisor

Van Potts is a 25-year leader in the adult beverage business and was trained by some of the pharmaceutical industry's top consumer packaged goods businesses until 1999.

Van has gained insights into the wine, beer, and spirits business through the eyes of producer suppliers, wholesalers, retailers, and final consumers. He has been a part of many formats of moving products from the producer to the end consumer, where he was personally responsible for taking an emerging brand from about \$800,000 in sales to \$4.5 million in sales.

He has also been involved with launch brands and seeing them attain and achieve the desired success envisioned by ownership. Van is a trusted advisor for owners as they try to differentiate themselves in a crowded marketplace, and he understands the balance between a direct business and a strong business supporting wholesalers and retailers, building the brand's value and equity.

We are an integral part of your team, partnering with you to help you meet your business goals. We'd love to talk to you!

GM GUILD 25



ALLIANCE BEVERAGE GROUP



Michael De Loach – Beverage Sales Advisor

Lifelong wine business owner and beverage aficionado Michael De Loach launched ABG in January 2020 with the belief that economies of scale and increasing costs of doing business for small to midsize wineries and distilleries have become prohibitive.

He believes that hiring a National Sales Manager, staffing support positions, and travel are now affordable only for the largest companies.

By tapping the resources of a network of well-connected brokers, successful sales managers, experienced finance managers and astute marketing executives, ABG has the ability to offer curated access to the three-tier market, while adding resources as needed to meet profitable growth objectives.

We can execute strategies and tactics in a group dynamic for the price of one National Sales Manager. Our ideal winery or distillery partner possesses a vision for growth and an ability to scale and can effectively collaborate with ABG's dynamic team of industry veterans.



SHINE WINE SERVICES



Jim Morris – DTC and Hospitality Advisor

Jim's 25-year career in the wine industry has been focused on the "front of the house"/consumer focused operations. Delivering memorable hospitality, creating warm inviting experiences, creating events large and small, and educating people about wine in a very non pretentious way are his hallmarks. Sharing his passion for the true craft of wine making and the people who comprise these family businesses has been driving force.

He has been able to adapt to rapidly changing conditions and has always sought the "different" way to approach things to ward off the "sameness" that happens when wineries become complacent. He has helped launch iconic wineries in Napa and Sonoma County and navigated the terrain when wineries were sold. He has always championed unique thinking through various projects in which he was involved and has created 100s of online wine experiences during the pandemic.

He refers to himself as the master connector of dots, the Swiss Army knife of the wine business.

GM GUILD 25



Contact us for client project detail & references.

**We design, build,
and launch
successful
ideas
with you.**

- **Brand & Identity Strategy**
- **Sales & Distribution Support**
- **Marketing & Media Content**
- **Creative Expression Engagement**
- **Broker & Distributor Coordination**
- **Product & Packaging Creative**
- **Architecture & Interior Design**
- **Management & Leadership**
- **DTC Strategy & Training**

Please reach out, and let's set up a Zoom call so we can learn more about your ideas, personally or professionally.

- **Discover** - Creativity Coaching
- **Nurture** - Business Advisory
- **Activate** - Mentoring & Design

Book a Call With Us

Book A Zoom

<https://paperbell.me/curatoco>

CURATOCO.COM
707-975-9761