



COURT OF
MASTER
SOMMELIERS
Americas

STRATEGIC PLAN 2023-2027



INTRODUCTION



It is with great optimism that we present to you our strategic plan, which will guide our organization for the next several years. As we move into this new phase of growth and development, we are excited to share our vision for the future and the steps we will take to achieve our goals.

Our strategic planning process has been a comprehensive and collaborative effort, which has involved extensive research, analysis, and input from our members and community. Through interviews, surveys, and listening sessions, we have gained valuable insights into the challenges and opportunities facing our profession, and have identified four focus areas for our future success. In addition to engaging with the community, we have sought the guidance of professional third-party experts in organizational management and strategic planning. Their expertise has helped us develop a plan that is grounded in best practices, which will help us achieve our goals in an effective and sustainable manner.

Thank you to Kevin Whorton of Whorton Research, Lowell Aplebaum of Vista Cova, and the 4,000 individuals who participated in listening sessions, interviews, and the 2022 CMS-A Strategic Planning Research Survey. We look forward to working together to bring our vision to life.

STRATEGY

PURPOSE

The Court of Master Sommeliers sets the global standard of excellence for beverage service within the hospitality industry with integrity, exemplary knowledge, and humility.

VISION

We create opportunity and community for beverage professionals.

MISSION

CMS-A advances the beverage profession through education, mentorship, and credentialing, elevating the beverage and hospitality experience for all.

AREAS OF FOCUS



Increase awareness and recognition of CMS-A and its members as **Leaders in the Hospitality Industry.**



Become the leading certification for **Professional Development** for beverage and hospitality professionals.



Cultivate an engaged and dynamic **Professional Community** that connects an even broader and more diverse group of students and members.



Foster innovation and growth that demonstrates **Operational Excellence.**

CORE VALUES



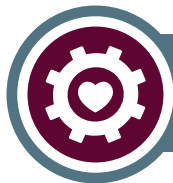
HOSPITALITY

Hospitality fosters a welcoming and inclusive environment, promotes positive interactions, and enhances the overall experience for guest and host alike.



INTEGRITY

Integrity is the foundation that a sommelier relies upon to use their power and position rightfully and set a positive example for aspiring professionals.



HUMILITY

Humility allows individuals to acknowledge their limitations, learn from mistakes, and interact with others in a respectful and empathetic manner.



SELF-CARE

Self-Care enables sommeliers to meet the responsibilities of the position and the needs of mentees and the community.



INCLUSION

Inclusion celebrates differences, promotes equal opportunities, fosters innovation and creates a sense of belonging and respect for all individuals and communities.

5-YEAR VISION THEMES



**INCLUSIVE &
DIVERSE**



**VISIBLE, RECOGNIZED
THOUGHT LEADERS**



**STRONG OPERATIONS
& FINANCIALS**



**MEMBER EXPERIENCE
& ENGAGEMENT**



**INTERNATIONAL
GROWTH**



**INNOVATIVE
EDUCATION**

GOALS - FOUR FOCUS AREAS

STATEMENT OF DESIRED GOAL ACHIEVEMENT

What is it we are trying to accomplish?

INDICATORS OF SUCCESS

In 5 years, how will we know we have accomplished our goal?

STRATEGIES

What actions will we take to achieve our goal?

FOCUS AREAS



INCREASE AWARENESS AND RECOGNITION OF CMS-A AND ITS MEMBERS AS LEADERS IN THE HOSPITALITY INDUSTRY.

STATEMENT OF DESIRED GOAL ACHIEVEMENT

CMS-A credentialed sommeliers are sought after for their hospitality, business acumen, depth of knowledge and contributions to a successful business.

INDICATORS OF SUCCESS

1. Guests and consumers see value in and request CMS-A credentialed sommelier for their expertise.
2. Employers seek out CMS-A credentialed individuals for employment consideration and advancement.
3. CMS-A becomes the industry standard and content for other organizations, magazines, industry events, etc.

STRATEGIES

- Partner with leading wine and business magazines and other organizations to highlight CMS-A credentialed individuals
- Increase awareness of the financial benefits of a CMS-A sommelier to employers
- Create and target leading hospitality companies with educational opportunities for training and development of their teams

FOCUS AREAS



**BECOME THE LEADING CERTIFICATION
FOR PROFESSIONAL DEVELOPMENT
FOR BEVERAGE AND HOSPITALITY
PROFESSIONALS.**

STATEMENT OF DESIRED GOAL ACHIEVEMENT

CMS-A is the leading certification and training program for wine & beverage professionals through an ever-expanding set of resources and training.

INDICATORS OF SUCCESS

1. Creation of multi-level courses and clear development path for preparation, training and certification at a variety of levels.
2. Professional development courses are scalable, financially self-sustaining and reach a broader audience than existing courses, creating a new and meaningful revenue stream for the organization.
3. Recognition and increased engagement with candidates in between certifications.

STRATEGIES

- Develop and execute a digital, multi-tier Business of the Sommelier course
- Expand educational offerings to reach beverage service professionals in retail shops, distributors, sales roles
- Through the collection of data from courses and the community, evolve training offerings to stay relevant and prepare professionals for an ever-changing industry

FOCUS AREAS



CULTIVATE AN ENGAGED AND DYNAMIC PROFESSIONAL COMMUNITY THAT CONNECTS AN EVEN BROADER AND MORE DIVERSE GROUP OF STUDENTS AND MEMBERS.

STATEMENT OF DESIRED GOAL ACHIEVEMENT

Create new pathways for students to engage with the organization and each other for professional development, education, and mentorship at all stages of one's career.

INDICATORS OF SUCCESS

1. CMS-A is positioned as a leader in the creation and development of a global community that is a conduit for the industry as a whole.
2. More candidates from an even broader background are continuing through in their pursuit towards an MS Diploma.
3. Creation of new opportunities for individuals and businesses to network and engage in/ with the community, outside of exams, including new digital tools to access content and mentorship.

STRATEGIES

- Clearly define and segment the multiple spheres of our community and create a clear path for networking and engagement with each group - globally and locally
- Offer online training and programming that creates community to engage with each other through technology
- In support of Master Sommeliers, utilize content experts from the broader community as contributors and course assistants

FOCUS AREAS



**FOSTER INNOVATION AND GROWTH
THAT DEMONSTRATES OPERATIONAL
EXCELLENCE.**

STATEMENT OF DESIRED GOAL ACHIEVEMENT

Build a resilient and adaptable organization that prepares students and businesses for future growth and change within our industry.

INDICATORS OF SUCCESS

1. Board and staff are focused on strategic, mission-oriented work.
2. Technology and processes streamline operations while delivering on our mission.
3. Newly established sustainable, recurring revenue enables additional investment in innovation and growth.

STRATEGIES

- Leverage technology to improve the experience of all stakeholders
- Establish new and recurring scalable revenue streams outside of examinations with a variety of ways to engage the community
- Create operations handbook for launching in new markets to build community, maintain brand and trademark integrity, drive financial sustainability