

WISE

STRONG LEADERS. HEALTHY TEAMS. SUCCESSFUL WINERIES.

**LEADERSHIP
FORUMS**

**MYSTERY
SHOPPING**

CLASSES

**CUSTOM
COACHING**

CONSULTING

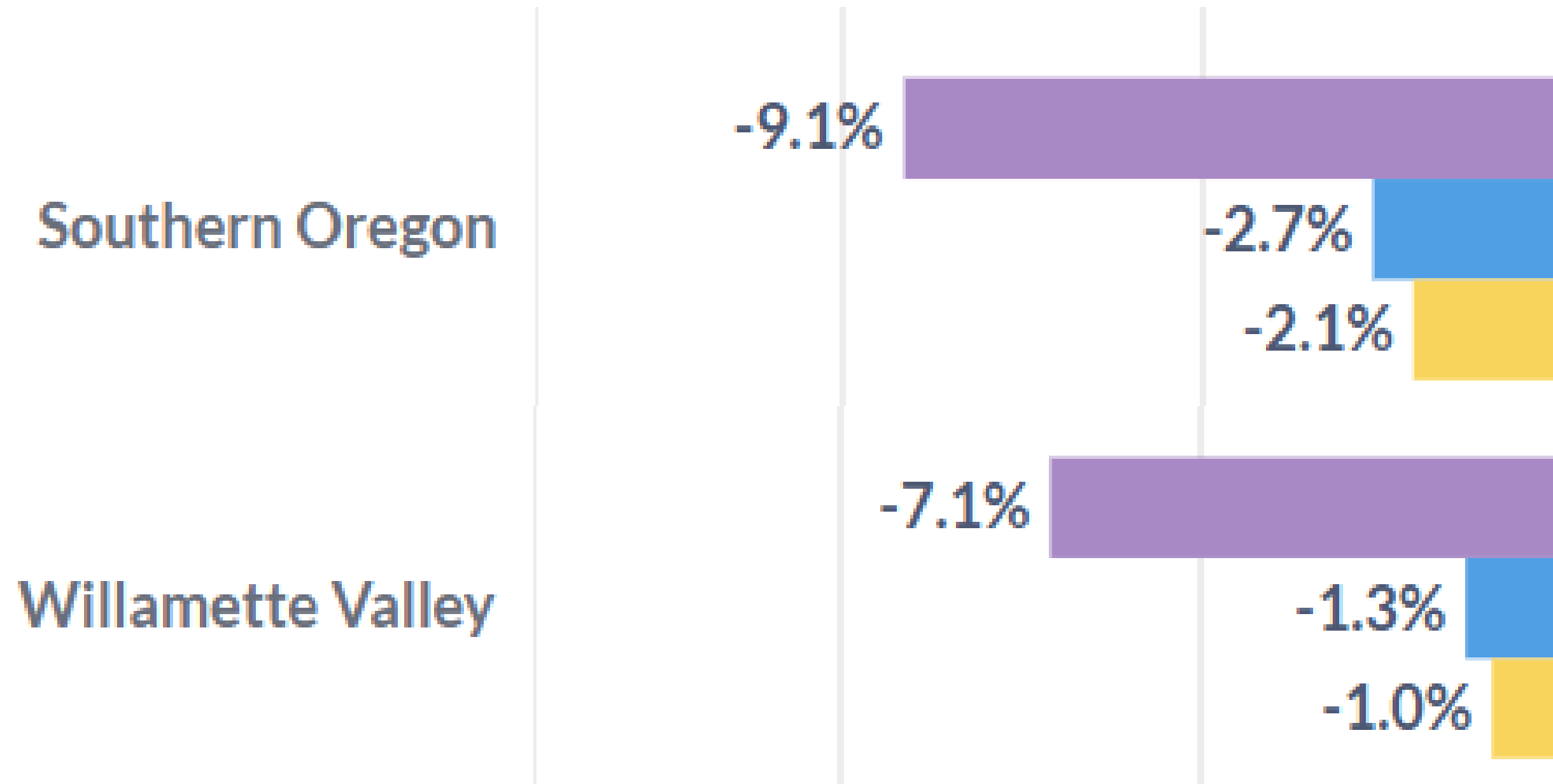
WWW.WINEINDUSTRYSALESEDUCATION.COM | 1-844-WISE4YU

OR Wine Symposium 2025 – WISE Recommendations

1. Invest in People
2. Lean Into Tech
3. Customer Centric

DTC Highlights YTD

● Visitors % Change YOY ● TR Sales % Change YOY ● Total DTC % Change YOY



DTC Highlights YTD

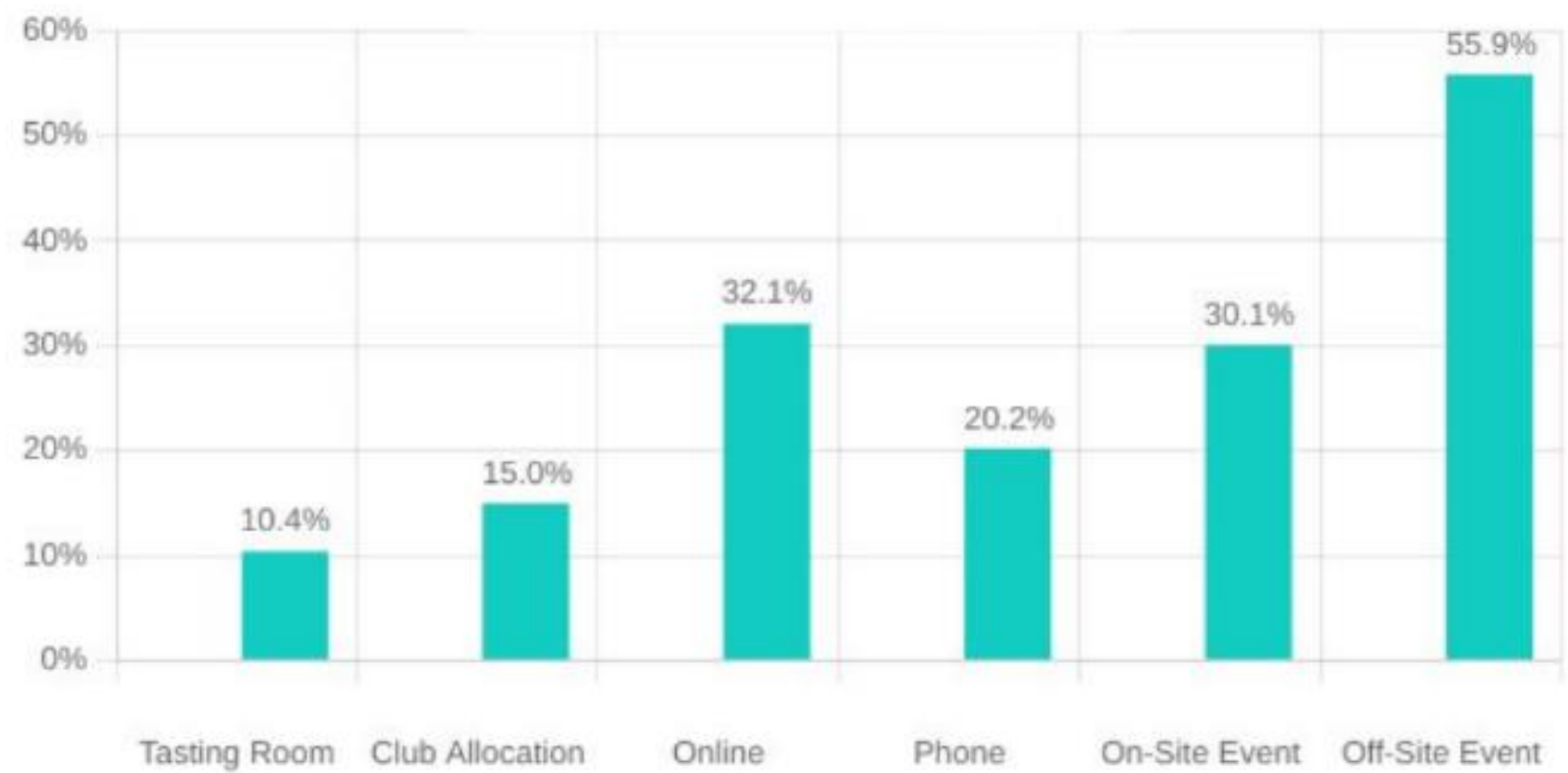
Region	Visitors % Change YOY	TR Sales % Change YOY	Total DTC % Change YOY
Central Coast	-3.8%	-5.1%	-0.6%
Lodi	-7.1%	-6.0%	-5.5%
Napa Valley	-5.1%	-7.4%	-7.0%
Sierra Foothills	-8.1%	2.4%	3.7%
Sonoma	-0.6%	-6.3%	-3.5%
Southern Oregon	-9.1%	-2.7%	-2.1%
Temecula	-4.9%	1.1%	1.5%
Walla Walla	-3.8%	-3.1%	-3.1%
Willamette Valley	-7.1%	-1.3%	-1.0%
Woodinville	-5.8%	0.7%	9.4%

Top 20% Grow +15.5% While Everyone Else Contracts -9.2%

Top 20%

Revenue by Channel

Percentage Change by Revenue Channel



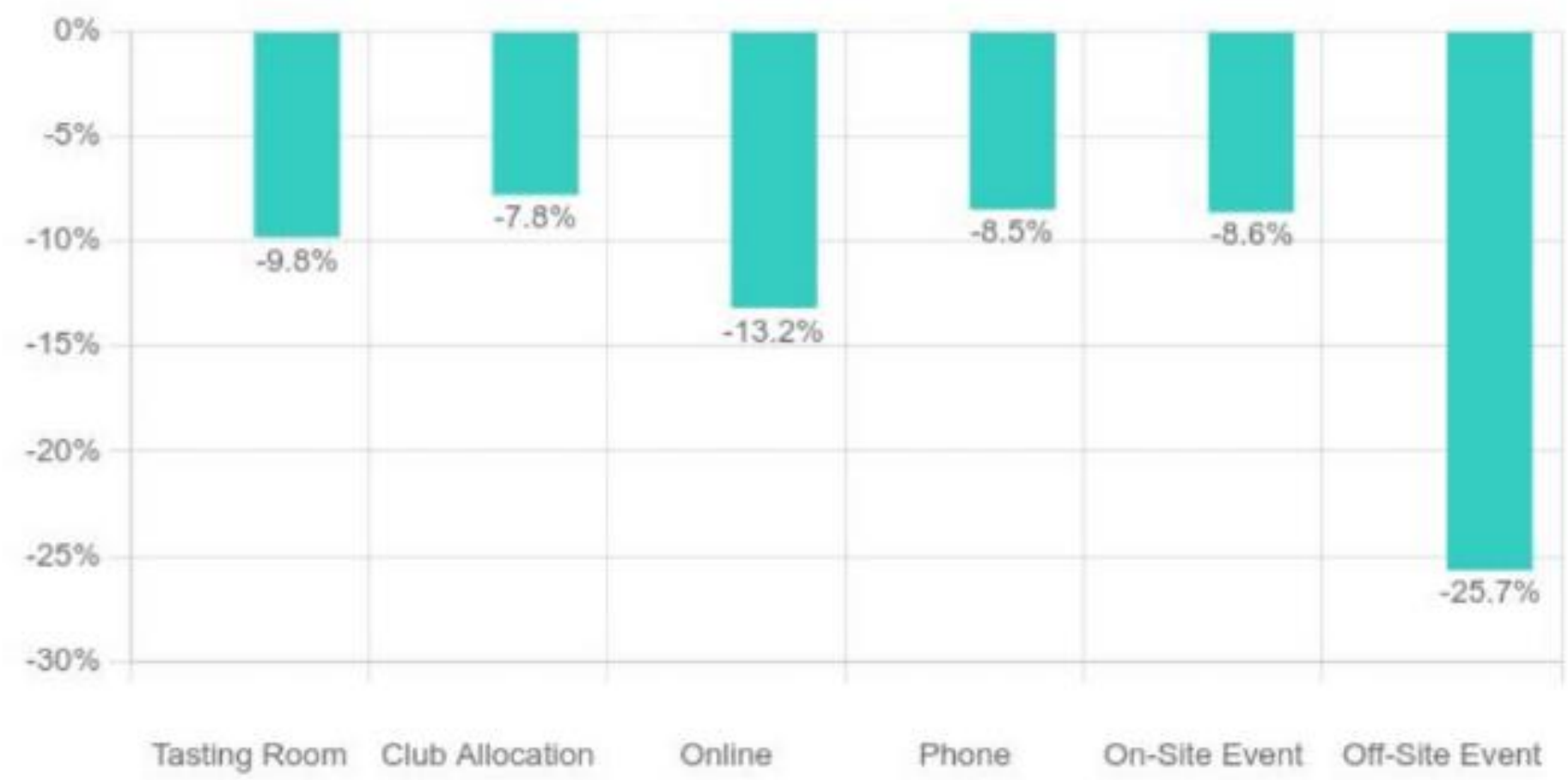
CommunityBenchmark

Comp DTC Total Sales: **15.5%**

All Other

Revenue by Channel

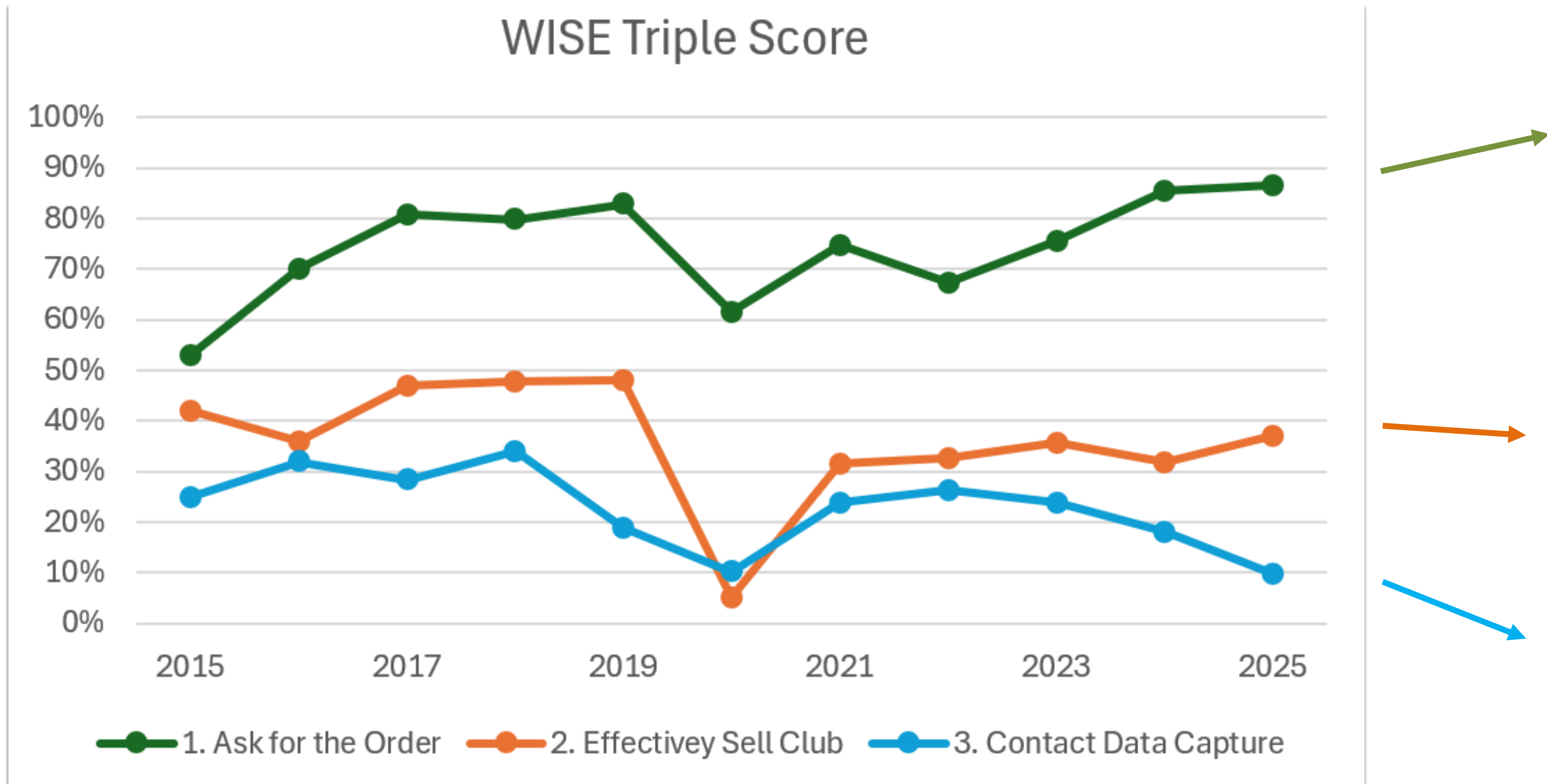
Percentage Change by Revenue Channel



Avg. DTC Total Sales: **-9.2%**



Insight: The data reveals a cultural gap: while wineries excel at creating memorable experiences, fewer apply the same rigor to asking, inviting, and capturing. Closing this gap would unlock significant, untapped revenue and loyalty.



We Miss 100% of the Shots We Don't Take

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Top 20% of Wineries

Team Revenue & Metric Goals

Top 20% All Other

49% 39%

Team Revenue, Metric, & Individual Goals

36% 27%

Team Revenue Goals Only

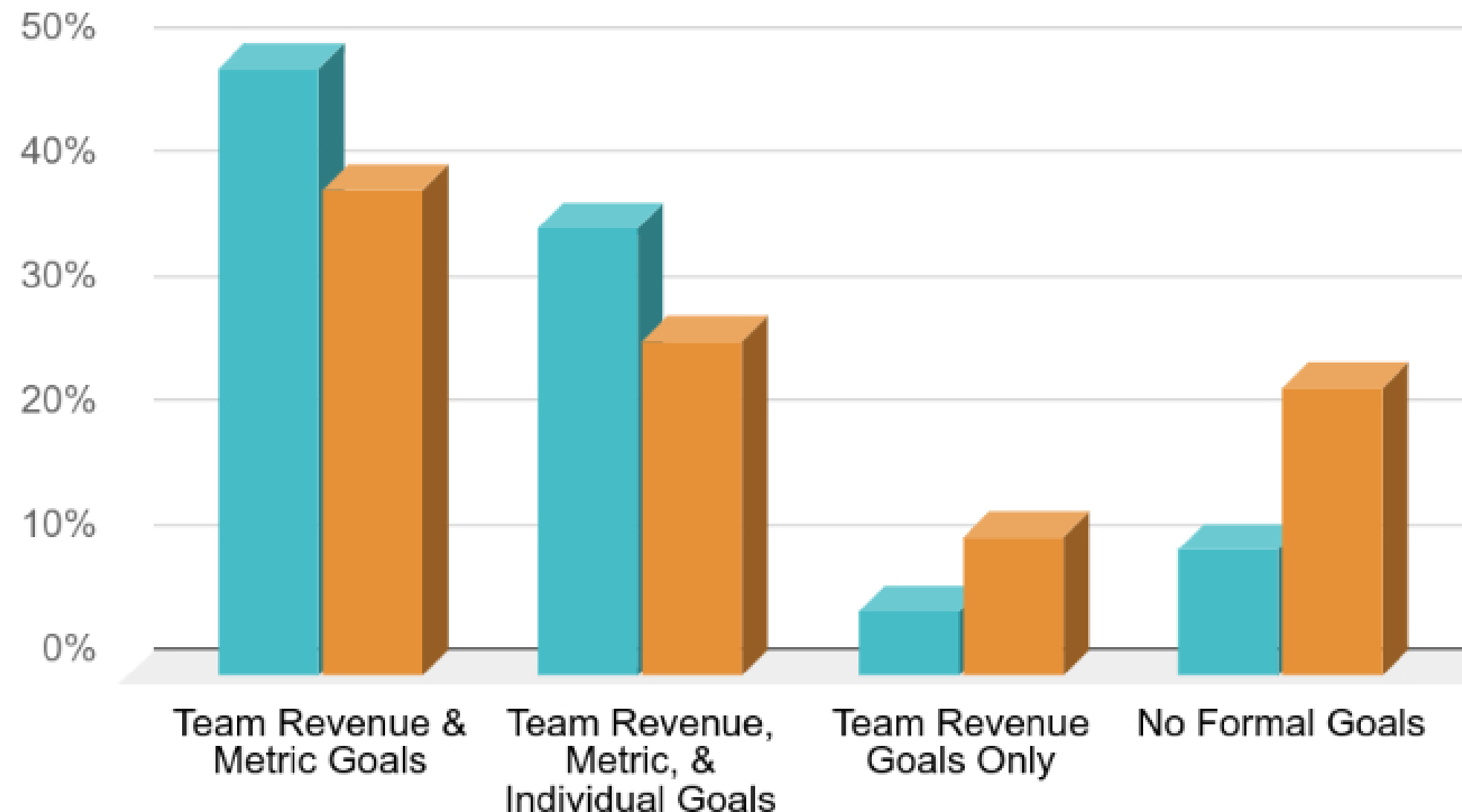
5% 11%

No Formal Goals

10% 23%

📈 The Goal-Setting Gap: Structure Drives Success

■ Top 20% Performers ■ All Other



Top 20% of Wineries

Category

Regular Team Meetings/Check-ins

Tracking Tools/Systems

Incentives & Recognition

Clear Individual Accountability

Other

Top 20%

All Other

36%

38%

30%

24%

21%

28%

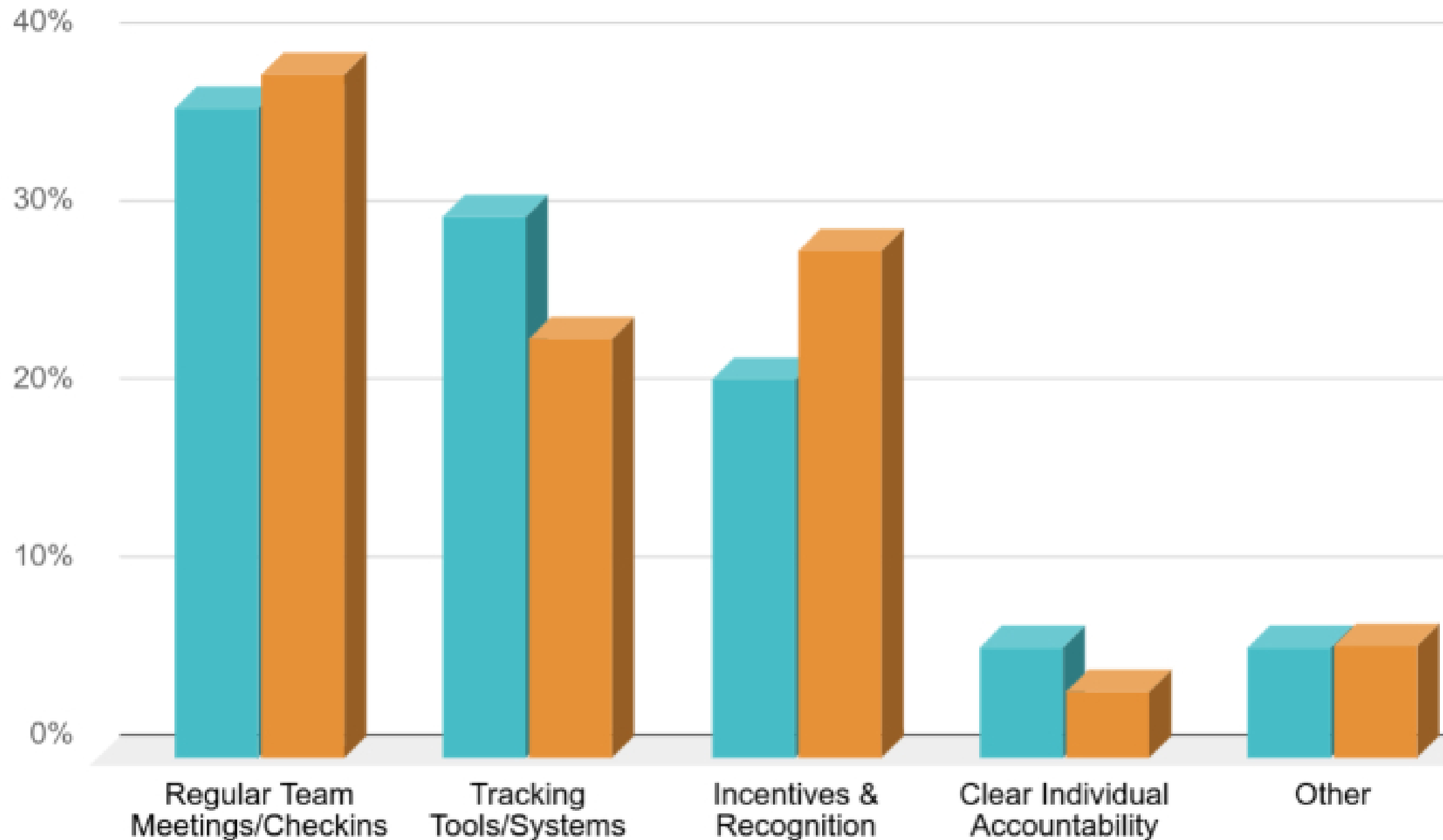
6%

4%

6%

6%

■ Top 20% Performers ■ All Other



5 -WEEK COUNTDOWN

PLAYBOOK FOR GENERATING
QND REVENUE



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Target Participant Segment

Visitors:

- Web, TR & Other Event
- Recent / past TR visitors
- Recent / past event attendees

Prospects:

- Social media followers
- Bloggers / influencers
- Strategic partners

Club Members:

- Current members
- Members by club level
- Long tenured members
- Former members (alumni)

DTC Customers:

- By R-F-M
- By past wine purchases
- By geography
- By VIP level
- By DTC channel (TR, web, social, phone)
- What else?

Corporate Clients:

- Corporate event (in person or virtual) clients
- Corporate gift clients
- Customers / club members at key organizations
- Non-profits / charities
- Winery, Stakeholders, Suppliers, Associations

End-of-Year Revenue Tactical Ideas

5 Weeks. One Goal: Make Gifting Easy.

1) Identify Gift Givers Who Haven't Gifted Yet

- Pull last year's Oct/Nov/Dec purchasers who haven't purchased this year
- Send: "Want me to help with your gifting this year?" (SMS or email)
- Use pre-filled carts to reduce decisions → increase yeses

2) Spot Corporate Gift Opportunities

- Search customer email domains for business affiliations
- Outreach: "We can manage your whole gifting list in 5 minutes."
- Offer handwritten notes + delivery coordination
- Create a *simple* one-page corporate order sheet

3) Offer "Gift Concierge Hours"

- Publicize times when guests can call/text for fast gift selection
- Script: "Tell me who, I'll take care of the rest."
- Promote as *elevated service*, not sales

4) SMS with Purpose (Not Blasts)

- Segment by wine style, club level, visit recency
- Use helpful, human language
- Example messages:
 - ✓ "Want me to hold one for your holiday table?"
 - ✓ "Sending to the same address as last year?"

5) Promote Magnums

- Display prominently in tasting room (they *sell themselves*)
- Label: "The celebration bottle."
- Offer magnum + note + shipping bundle

End-of-Year Revenue Tactical Ideas

5 Weeks. One Goal: Make Gifting Easy.

6) Host Gift 2-Packs

- Pre-wrapped, priced clearly, ready to grab
- Place **by the exit** — not buried behind the bar
- Signage: “Going to dinner? Grab a host gift.”

7) Club Member Lift

- “Gift Like a Wine Insider” messaging
- Extend member pricing to their giftees
- Reward gifting with points, perks, or shipping

8) Last-Minute Digital Gift Saves

- Offer tasting experience certificates (feel more personal)
- Digital gift cards with attractive visuals
- Promote heavily Dec 20–24 when panic sets in 🙄

9) Team Enablement

- Daily pre-shift: one script + one goal
- Share quick wins → celebrate momentum
- Tiny incentives *work* (stickers, bragging rights, coffee cards)

10) “Reorder What You Loved” Reminder

- Pull guests who visited in the last 60–90 days or club members from recent shipments
- Message: “Opened any favorites yet? I can set aside more before shipping deadlines.”
- Then suggest: “Would you like to send that to anyone this season?”

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Jenn Warrington
The Glue & Partner



I'd love to learn more about your needs.
Let's set up a meeting now!

A close-up photograph of a hand holding a glass of wine. The glass is partially filled with a dark red wine. The background is dark, and the lighting highlights the hand and the glass. An orange gradient bar is positioned on the left side of the image, containing the text 'THANK YOU' in white, bold, uppercase letters.

THANK YOU

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