

WISE Winery Lessons

1. Staff Concerns / Challenges / Issues

WISE Notes: A core WISE principle is first we need to take care of our team members so they can then take care of our guests. Here are some highlights of challenges that emerged during Session #1 and potential solutions.

A. Be Proactive. Be Adaptive.

- Staff needs and concerns are important. *So, we need to pay attention. Give it careful thought. Take it seriously. There is no such thing as over communicating.*
- Communication – tons of it. Weekend Warriors and Core staff, tea time, cocktail zooms. Keeping this going post reopening. Frequently touch base with our staff throughout, discovered some have anxieties / health issues we didn't know about (more sensitive to these now). *There is no such thing as over communication during times of crisis, and any times of change management.*
- Employee wants and needs vary. Some older members are not comfortable coming back, can we get them on the phone or doing virtual tastings from home? Not everyone wants to be redeployed to production . . . *Platinum Rule (treating others as they want to be treated) works for managing our employees too.*
- Scaling for the new norm requires change in mindset. *Focused team members dedicated to cleaning during and between service.*

B. Energy Management Needs are Real.

- PPE Challenges – Working with guests requires 30-40% more energy. Absolute staff and manager exhaustion, taking “breathing” breaks.
- Watch out for “Covidload” = Covid Over Load
- By appointment only allows us to moderate tables and manage flow.
- Extra time between appointment needed for both cleaning and for energy breaks.

C. Don't Skip Staff Training.

- Wanted to go by appointment only (BAO), this took care of that problem! BUT – where staff could handle 4 groups at once, now they have one table, and don't know how to fill the time with them. *Need to choreograph a new guest experience design that optimizes the service flow.*
- Importance of role-playing pre-reopening. *Have staff share their fears, and worked through it together. Sales and service is all about building confidence. We need to get the confidence up of our team members – in this new environment – as quickly as possible.*
- Lots of staff training, need for “re-boarding” for the new norm of private tastings. *Shifting from tasting bar service to table requires changes in steps of service, and a balance of sharing information and leaving them alone. Risk of leaving them alone too much slips into restaurant style – less engagement often means less sales.*

D. New Management Skills Required.

- Hiring under Covid – *Use questionnaires and Zoom interviews as pre-screening tools. Then in person, physical distancing interview step is still very important for customer facing new hires.*
- Teambuilding under stress – *Needed more than ever. Consistent communication rhythm. Exercises that help team build trust and communicate better are critical.*

2. Guest Experience Offering Changes

WISE Notes: As both our guest / staff needs and C19 compliance protocols evolve, so too do our winery guest experiences offerings. A core WISE change management tool – Guest Journey Mapping – is being put to good use during many winery re-openings. Here are your ideas gathered during Session #1.

A. Benefits of a Slow / Soft Launch

- Opening up for wine club only. *Help team members get used to the new normal first before opening to all.*
- A few others have not opened yet. One was pretty exclusive to begin with and only open by appointment. Considering one or two appointments per day. Prior to Covid did 2 per day.
- One has limited space and considering two appointment slots per day with downtime between for staff to clean, take a break etc.

B. Change to Private, Seated Experiences

- We used to offer two experiences at bar, now everything is a high-end seated experience: sales up/ per person, group up per poured
- Phase 1: Offering 8 selected wines by the glass. Only doing by-the-glass sales and bottle sales only – safety. Guests do not touch bottle. Staff pours.
- Flights: 4 wines at a time: reds/whites – tastings. Have to have enough staff to keep safe. One staff member per table- no cross contamination.
- One winery has been open 2 or 3 weeks and has refined their offerings: reduced the # of wines from the original offering in the first week, adding an optional welcome wine for those on time and a bonus wine for those with time left.
- Seated tasting with 5 to 6 pours – determined by how much room they have for seating pouring.
- Flights used to be 6 wines, now back to 4. Moving forward cautiously.
- Hard to leave people alone – used to having a lot of interaction. Most people want to share among themselves.
- With flights, check in every 10 minutes, interaction, asking a lot of questions.
- Found 90 minutes necessary for appointments
- 2 glasses per taster - with wine poured into carafes for guest to minimize pouring contact
- Maybe overstaffed? *Best to err on the side of caution. Larger conversion rates and average order value seems to be offsetting increased labor costs.*

C. Traffic Flow / Change to By Appointment Only

- Encouraged to make reservations. Will take walk-ins if available seating
- Used to be 7 days, now only reservations 2 days a week
- Saving a few of the tables for walk ins
- Each weekend busier than previous
- Use TOCK for reservations especially for ‘day of reservations’ – used to use google calendar with hand write in schedule page.
- PEAK PRO – links appointment with sale. Better if people book themselves and be more self-sufficient. Available seating can be seen when making reservation online.
- Arrival management. Need to avoid waiting lines to be seated. If table is not yet available, give them a splash of bubbles and a menu while they wait in a social distanced waiting area. *If no*

D. Weather Issues

- Difficulty scheduling outside because of iffy weather.
- Have to move indoors because of sketchy weather.
- *Need to fluid management of reservation system (table availability) and have a backup plan for rain days!*

E. Creative Use of Venues

- Have tent outside without chairs to serve the opening wine and then escort them to table
- Turn a portion of parking lot into new tasting space – use barrels and plants
- Use lawn for a BYOE (bring your own everything) picnic and sell wine by the bottle. Pack in it, pack it out fit Oregon’s camping culture.
- Maximum use of the property. Can seat up 150 people with social distancing.
- Make sure all spaces you use for tasting are included in your OLCC permit (from Morgen at WVWA)

F. Changes to Tours

- How to do barrel tastings – maybe with a wine thief into decanter and then pouring from there
- How to incorporate vineyard tours again – walking tours OK – ATV tours likely too close for comfort. Need to think on that.

G. Food Solutions:

- Food and picnics: guests responsible for cleaning up after their selves. Guests bring their own food.
- Not in food business – greater concerns – people can bring outside food.
- Have trash receptacles convenient for people – please support our local business – do take out with them and have a glass a wine with us.
- Do a partnership with local business that can deliver food
- Take burden off winery to provide food.
- Urban setting bringing in occasionally a food truck.
- Kept cheese plate on menu – almost every guest is ordering a cheese plate.
- New space outside patio – pre-order bottle of wine and cheese plate. Don’t have to pre-ordered in tasting room.

3. Personal Protective Equipment (PPE) Meets Hospitality.

WISE Note: Lots of core WISE Principles (like Service Heart, Surprise & Delights) are more important than ever. How can we deliver both a safe and memorable experiences that “keeps the magic alive?” Here are your ideas gathered during Session #1.

A. Before Guests Arrive

- With reservations you can learn more about them and get to know them before they come in – create a relationship prior, check what they loved before if they’ve been in.
- Messaging around compliance and protocols

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- Signage at winery with guest expectations with compliance guidelines – website and emails with pre-visit messaging – policies in a helpful, positive way
- Capturing data in a touchless environment – is a challenge; get all parties info with the reservation
- Have person at gate with a walkie greeting guests and giving them the rundown with instructions
- Emphasis on pre-messaging when appointments are made
- We're texting guests on the morning of their appointment, asking them to call when they arrive so we can share personalized check-in instructions. We then have their host meet them outside, and guide them to their reserved table.

B. Lots of Service Heart

- Greeting with a generous pour before being escorted to their table
Lead by example – staying 6 feet away
- Keep it lighthearted
- Deliver the instructions in a light way
- Being a little more dramatic with hand gestures and speaking with the eyes
- Having owner / winemaker walking around the grounds thanking visitors for coming

C. Mastering Masks

- Face shields so guest can see the whole face of our team members
- Super cute fabric masks aren't easy to talk through, hospital masks easier to talk and be understood through – stay on better
- Wear badges with pictures of the staff
- Considered branded masks
- Lots of signage; 90% of our guests are wearing masks, though we don't require it
- One winery has issues with people not wearing masks (like twirling it on their wrists) and getting too close to staff without the masks on. Solution? Thank others nearby for wearing masks, loudly enough for others to hear.
- Neck gaiters, scarves, bandanas are great for our winery staff who occasionally enter the tasting room, too. They can be pulled over your face easily.
- Q: Has anyone had any employees who have had issues with the mask? Either medical or claustrophobia? A: We have not, but a face shield could be an option; A: Ones that go around the ears or scarfs are more comfortable; A: Employees can get medical exemptions. Get a doctor's note. Encourage employees to use clear face shields (from Morgen at WVWA).
- From Morgen at WVWA: You don't need to provide masks for guests but it is highly recommended to have some available. ALL employees need to wear masks or face shields. We are hearing some that some employees at wineries are not following the face covering guidelines.
- Q: If an employee wears a face shield, do they also have to wear a mask? A: Either a mask or a face shield. I'll post the Governor Guidelines for face coverings (from Morgen at WVWA)

D. Operational Creativeness

- Have added walkie talkies for staff to communicate to improve the guest and staff experience
- Laminated info that can be easily cleaned off between guests
- Restroom checklist policy posted – ask the guest to clean up after themselves; appoint one staff member as well.

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- One person to check them out, so less people touching the iPad, cleaning in between; or each associate has own iPad
- Tasting Bar set up with bottles or other displays to discourage people from going to the bar for tasting
- Serving everything one glass.
- We bought 6oz carafes and paddles to serve four wines. Bring everything at once, and have the guest pour their own from carafes
- Using Tock to capture data at point of reservation
- Struggling with WD – not touchless enabled
- Using discardable, single use data collection forms with one person responsible for data entry
- Having people sign up on website for club, data via touchscreen
- QR codes to convert for contact data capture.

E. Surprise & Delight

- Welcome pour with personalize tasting menus – recognition without the hug
- Have wrapped chocolates available because they normally have food but don't at the moment
- Providing a special taste of unbottled wine as a reward for visiting
- Offer tasting kits to be sent out for virtual tastings – if they want to keep the memories alive / or share it (remotely) with friends or family encourage them to sign-up for virtual tastings to enjoy when they are back at home.

4. Tipping in a Touchless Environment:

Challenges:

- How are people handling credit card tips if you are touchless?
- Tips are a problem – we are way down on tips unless people specifically ask, and it's usually after the transaction
- It has been a challenge to learn a comfortable way to "ask" for a tip.

Potential Solutions:

- We set up each table with a sanitized stylus pen, in addition to visibly cleaning the iPad before presenting to the guest. In the 3+ weeks of being open, the generosity of the guests has been remarkable which has been a wonderful bonus for the team with the added physical requirements with the new layers.
- We added a note to our menu about letting your server know if you'd like to leave a gratuity.
- If you have tips set up on your POS at checkout it makes it easier for guests to leave tips.
- Does your POS allow for tips? Percentage...or even better, a \$ amount?
- When we're ringing them out, we just ask the guests directly and as graciously as possible, and show them the options that are on the iPad and say that we'll press the button for them if they are inclined to tip, but we also emphasize that tips are completely voluntary...
- You can also enable tips on TOCK if you're accepting prepaid reservations
- We have three percentage options or a custom \$ amount option
- Our POS allows guests to select a \$2, \$5, \$10, custom, or no tip. This is the first time that we've allowed our team to officially accept tips. We're using Commerce 7.
- We have a custom tip line we just introduced. People have been really wanting to tip after seeing the work that it is to run the tasting room now.

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- We removed the cash tip jar.
- Custom tips line is a good idea.
- We also offer the guests the option, either a percentage or custom amount. All the guests seem to tip, and the staff is making good money each shift. It's a nice way to boost pay rate with no expense to the winery
- We allow guests to touch our credit card screens, but we're giving them logo pens with a stylus on the end.
- We use an iPad (WineDirect). We drop a tablet off to close out the tab at the table and we cover the iPad with plastic wrap where the guest would touch the system, not amazing for the world, but it works and guest & staff have felt okay with it. We change the wrap between each guest.
- Wine Direct is starting a beta program for touchless payment this month. We have an old version that we got last fall which we're using now but will be transitioning to the new EMV as soon as it's available. It takes touchless, chip, or apple/google pay.
- Our checkout is at our bar (not being used for tastings). We added a plexiglass panel and moved the receipt printer and credit card swipe to the customer side of the plexiglass... and we have two jars – clean pens and dirty pens.
- We are asking for CC info when confirming the appointment over the phone so that we have it ready in WineDirect to charge at the end of the tasting.
- We use Acuity scheduling and it has the option to create different appointment types and accept credit cards before booking... it's a good option and is only \$25 a month.
- I don't know if this is true across the board but in restaurant regulations leadership staff cannot be a part of a mandatory tip pooling system if said manager has hiring and firing responsibilities.
- For tipping you should check with your CPA / HR specialist. Make sure you are in fully compliance (taxes, etc.) (from Morgen at WVVA)
- Check out <https://www.wageandhourlawupdate.com/2018/04/articles/department-of-labor/department-of-labor-issues-initial-guidance-on-tip-pooling-amendment/>
- WISE blog on tipping: <https://www.wineindustrysaleseducation.com/wise-industry-2020-tipping-survey-analysis/>