



**WISE Winery Lessons**  
**Oregon Community Leadership Forum (2 of 3)**  
6/24/20

**Hot Topic #1:**  
**Sales Challenges / Issues / Ideas**

How to drive more tasting room sales, club sign-ups and contact data capture despite C19 challenges?

*WISE Note: A core WISE principle is the WISE Triple Score – (1) Asking for the Sale; (2) Presenting the Wine Club; (3) Capturing Contact Data. All of this still applies during this season of COVID. Here are some highlights of challenges that emerged during Session #1 and potential solutions.*

**Encouraging Club Signups**

- When club members bring friends, extend the club benefits to those friends. This has led to additional sign ups.
- We are curating different club packages to get people in the club, with respect to reduced income; offer 2 or 4 bottle shipments instead of 6, combining shipments, etc.
- If you don't have one already, consider launching a referral program for club
- Offer virtual tastings complementary for club member wine releases ... and/or a little something extra to encourage engagement/signups
- We have a special wine that's club only that we pour to guests who are engaged. We're seeing club joins due to this.

*WISE Note: Consider extending benefits for club membership to club-member referrals if the club member arranges to have them visit and receive this special VIP treatment.*

**Mores Sales Conversion Rates & Higher Average Order Size**

- Consider bringing out library wines, multi packs, small lots - just different things that might engage people
- Have (laminated?) collateral such as order forms, price lists, and specials easily accessible to guests (table tops, place settings, etc.) – use erasable markers for easy cleaning
- Notice the bag/box that is being filled for the guest purchasing wine – only 4 out of 6 spots filled? Ask the guest if they want to fill those spots... if they are shipping, let them know that it won't cost them (much/any) additional to add some wine.
- We're giving a "bonus pour" to every group. Makes them feel special, and we've seen an increase in sales
- We are having more success because we have extra time to tell the story
- We are offering deals on wine we want to move

*WISE Note: Don't forget to actually ask for the sale. It's obvious, but not every host asks for the sale every time . . . and make the 'ask' specific to what they are enjoying. There isn't a wine called 'Anything' so get creative with the ask and let's not just say 'Anything to take home today?'*

## **Get Creative with Data Capture**

- By-appointment helps for data collection, but don't forget to capture it from the guests of the person who made the appointment
- We also have seen a huge increase of member sign ups from online, phone, and the people that we make room for who show interest.
- Use social media to capture data
- Use reservation information to learn more about them and get to know them before they come in – start the relationship early.
- CRM - We are taking this time to have the team really get more information into the CRM, they are now really seeing how great it is to have extra information about the guests before they arrive.

*WISE Note: Now more than ever it is very important to capture contact data for ALL guests as it enables wineries to build their business and not be dependent on any one channel. (There is also the argument that it enables future C19 contact tracing if necessary.)*

## **Driving Traffic / Sales:**

- Reservations for wine tastings is working, and leading to better sales due to the ability to work 1:1 with customers
- Invite people back to the winery through email
- Our online sales are through the roof...which led to a discussion around using that increased awareness of emails to drive TR traffic back
- For anyone who has yet to open, we opened to club members first and advertised it on social media. We go the chance to practice with our members who are a bit more patient with us. We also have seen a huge increase of member sign ups from online, phone, and the people that we make room for who show interest.
- We added another staff member over the weekend and had a significant increase in sales. It allowed us to take more walk ins and also allowed our servers more time with each table. If you have the room for more tables, I highly recommend trying it out
- Using tech/pictures to create virtual tours. Use of emails and Social media to drive traffic to non- peak times. Using Tock for Pre-Arrival info (check out Archery Summit).

*WISE Note: Ensure you have enough staff coverage to enable them to spend enough time with guests to build rapport, trust, thus sales. With an extra staff member to handle sanitizing, checkout, or other operational tasks, hosts can spend the time to make sales.*

## Hot Topic #2: Operational Innovations

Best practices for providing a smooth guest experience while also adhering to C19 safety protocols.

### Handing the Issues with Masks:

*1<sup>st</sup> Mask Challenge:* Is anyone part of the counties that now require masks? Are you finding the push back is less or about the same? *Potential Solutions:*

- I wish we were; it would make our lives easier. It just started today and I'm genuinely hoping it will reduce the number of people being "surprised" by the need to have masks even though we're doing our best to communicate that!
- On the mask front I've been saying "it's for your safety and for ours as well" to try and get them to think about it from a less selfish way. and then joking with them that "of course we won't make you wear a mask while you're enjoying wine.... that makes it so much more difficult!"
- Have the Welcome Host ask guests without a mask on: "Do you have your mask with you today?" If the guest answers "no," have the host hands them a mask. (Our host wears a mask; she offers the mask to those who show up without one.)

*2<sup>nd</sup> Mask Challenge:* Guest stated: If they have to wear a mask they will not be coming to our event – how to respond? *Potential Solutions:*

- Better acceptance if we let them know this is what we had to adopt to be open and offer an experience for them.
- It is not really an option right now. Whole state is under mandate. Be really gentle. This is to care for those around you – for the safety for all.
- This is our policy we have implemented for the safety of all our guest. This is a mandate. I hope you will reconsider so you can enjoy our event.
- This is for the protection of our guests, protection for our staff so they can be comfortable and safe who constantly see people every day, we have to protect them. Staff members with risk factors.
- Mask policy is not about them but for protection of others. It's the only way we can offer this experience. Not the wineries' choice but what is required so we can be open.
- Make masks/protocol seem like it is a benefit: Feedback from guests: Winery was aware, sanitized, and safe.
- We are following the governor's guidelines on masks.
- For everyone's health and safety, we ask the following of all guests:
  - Wear a facial covering when not seated.
  - Practice social distancing.
  - Provide contact tracing information.
  - Reschedule if you have recently been exposed to COVID-19 or are exhibiting symptoms.
- For our part, we will do the following.

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- For everyone's health and safety, we do the following:
  - Require staff to wear facial coverings and gloves.
  - Space tables a minimum of 6 feet apart.
  - Sanitize surfaces regularly throughout the day.

*3<sup>rd</sup> Mask Challenge:* I'm having trouble with hearing customers, and so is my staff. Communication is an issue with the masks. *Potential Solution:*

- Wearing face shields: guests like seeing staff expressions and has helped a lot in communicating because customers can see our full faces

*WISE Note: Model desired methods by being more dramatic with communication – speak more loudly, slower, use gestures, use collateral or other 'props' if possible.*

## **Highlighting Safety, Graciously:**

- Show some of backstage: gloves on, cleaning kit: sanitizing tables between guests.
- Put hand sanitation on every table
- Communicate policies on website, on confirmation email, appointment reminder, cute signage, table tent signage
- How to get people to comply: Sign: 'mask please'
- All staff have same color mask or neck gaiter facemask or mask with winery color and logo.

## **Welcoming Guests:**

- Welcome wine – relaxes guests, a gift right at the beginning.
- Control guest experience: Welcome them with a poured glass of wine they pick up, lead them to all aspects: gate keeper, staff to walk them up the path, introduce them server.
- Welcome wine, take the glass with them to the table. Gatekeeper tells them how many in their group. Pour welcome wine ahead of time. Wine is at barrel bar for guest to pick up. No chairs at waiting area so they know they will not be staying there.
- Have their table set and pretty when they get there.
- Explain where bathroom is and policy about social distancing.

## **Guest Experiences Execution:**

- One glass on table already for guest plus the one in the guest's hand from the welcome table.
- Seated flight – five wines at table before seated.
- Start at restroom and wash hands, pick flight of 4. Pour flight of 4 on tray and they take to table – not very busy at all – no reservations – waiting for people to come through – small winery.
- Just one staff, now one more person helping. Small, 4 tables max – make reservations.
- More appointments: Weekends first, add week days.
- Extend hours or outdoor space as weather gets nicer.
- Stay on top of table cleaning and glassware – 30 minutes between reservations

## **Guest Experience Design:**

- Rethinking new experiences: tour experience, utilizing new areas on properties. Private picnic area away from main area: wine & food baskets, requires limited staff hosting.
- We thought of offering special tastings at a separate location than our tasting room, for example having tastings by the river on our property for wine club members. Maybe this would help with being able to accommodate more people.
- Terrible weather – how to accommodate more guests? Huge tent – not cute.
- With weather getting nicer, need to explore other options: ATV tours, reserve outdoor spaces away from the crowd for 2 hours. Have to host more people – staff-free, buy a picnic: cute cabanas, all set up with wine and food, opportunity for sales? Set up the vehicle in a way like in the golf course, where when you circulate around and check in with products in the vehicle.

## **Accommodating More Guests:**

- Looking at Music nights, club member nights, stay open until 7pm (longer hours to accommodate more people)
- Everyone wants a 2:00 reservation, no 11:00am. reservations. So many walk ins at the same time. Just because we have an empty chair doesn't mean we have space.
- Tasting by river for Wine club members, get creative with outdoor spaces
- Huge problem with kids this weekend. We're known as family-friendly winery. In future will provide better accommodations for families: outdoor private experience for families.
- Parents, rather than monitoring their children, let kids (many under the age of 4) run around, scream, run out in road – staff had to nicely state that children need to stay within our guidelines – “Kids are people too” and need to follow guidelines.
- Used to be dog friendly – had to stop allowing dogs – guests want to pet dog, dog wants to run around.

## Hot Topic #3: Managing Visitor Volume

... from staffing levels to reservations tips.

*WISE Note: It takes more staff (dedicated cleaners and live phone coverage is a must) and more time between guest experiences during C19, so plan accordingly.*

### Time Management:

- Marking Time: 25-15 minutes before the end of the experience, starting the wrap up procedures, moving campers to bottle or glass sales and picnic tables away from “tasting” space
- Using this time to change member benefits (here is what we *can* do for you...).

### Automation/Technology: volumes of reservations, confirmations, expectations

- Using Tock, Open Table or Google voice to send texts.
- Using Wait List text function in Tock.
- Open Table reminder “If you are more than 15 minutes late, your table will be released.”
- Managing turn times closely (through Tock, Open Table) to reassign if necessary. Using Google Voice to manage wait list via texting.
- LFMF (learn from my fail) – changed Cellar Pass from 12 hour cut off to one hour, got slammed, could not get to the app to change it back. Proceed with caution...
- QR codes work well – with the menu, procedures, etc.

### Have Enough Staff:

- Have enough staff to handle the phones, bussers to help clean/clear between visits, etc.
- Staff is keeping glasses moving along, not letting empty glasses sit too long. Concierge to manage the phones and cut off walk ins before they become walk ins. Support staff to manage all the glass so the team can focus on selling – aces in their places.

### Contingency Plans:

- Set aside a table or space for walk in members
- Alternatives to no: offering 2 for 1s for a rescheduled appts, calling to wineries within the neighborhood to see who has availability, can’t do a tasting today but we can do a bottle sale or BTG in ton the picnic tables

### Club Releases & High-Volume Weekends:

*Challenge:* How are people handling wine club releases weekends? *Potential Solutions:*

- Schedule appointments with a staggered start times to balance check-in
- For club releases, we offer elevated flights and food pairings, but still by appointment
- We’re pairing up our team members, so they switch between host and working behind the scenes each hour.



- We hired a bar back and a host so that we don't have to swap positions and TR associates can focus on selling

### **Saying No Gracefully:**

*Challenge:* For anyone who has had to turn away guests – what tips do you have for that conversation?

#### *Potential Solutions:*

- We keep a list of available wine at the door and an iPad so that we can make sales if we can't accommodate them for an experience.
- We have had some groups (4 tops) book together but want to be spread out at a table. We also had some groups that booked together but did not want to handle shared carafes. We are confused by it, but it has popped up 3 times recently, so maybe just be aware that groups booking together may be social distancing together?
- Noticed a very changing demographic – younger guests coming in, older members staying home. Will that have an impact on metrics? Increasing commission on slower days. Re Member Events – looking at series during the week or other options now that big group events are gone for the year.

### **Public Spaces:**

#### *Challenges:*

- For those who are now part of the required counties, how have you understood 'public space'? It's for all indoor spaces, but not at tables.
- Rain contingencies, using production space will dry up very soon, and then what?
- Curbside is slowing down, more and more are opting to come in and taste (during the week) and pick up, adding to the order.

#### *Potential Solutions:*

- We are not setting guests inside and were using that space for a safe zone for our staff to be able to take a second and not wear the mask.
- Space is the biggest sticky wicket – especially with the last few rainy weekends (of course it rains on the weekends...). Many are using cellar or production space, which will be lost during harvest, so what is the next option? Keeping a few tables open for walk in members.
- We tried the parking lot but we had a very negative response from guests. Others have used the parking lot successfully by creating a designated space.
- If you expand your service area outside your current licensed premises make sure you submit an application to the OLCC.
- From someone who applied for the expansion, make sure you find the application for Covid related expansion. It's less arduous and very quick for approval.