

WISE Community Forum for Oregon Wineries WISE Winery Lessons – 3 of 3 July 8, 2020

A. VIP Club Member Experiences & Benefits during C19

Our discussion included creative solutions to maximize our Club potential under C19

- How to provide VIP club member experiences during C19
- Keeping staff motivated to keep current members happy during C19
- Other VIP benefits driven by or addressing C19 challenges

WISE Tip: During this season of C19 we have a good reason to reach out and build even closer relationship with our club members. How are they doing? What can we do to help support them (i.e., virtual tastings, local deliveries, hold if needed, etc.)? People remember how they are treated, especially during challenging times.

Top 5 ideas:

1. Special Times – Offer Club member-only hours or days of the week
2. Priority Access – Offer members the only indoor seats (rain) or outdoor seats (C19 restrictions), access to live music events
3. Bespoke Experience – As a club member appreciation, offering private happy hours for 2-6 ppl (club members that are friends). Winery rep sits down with them with snacks and open bottles from cellar. These guests are specially invited. The goal is not sales but connection with great members.
4. Special Delivery – Target phone campaign (focus by delivery location) to club members about specific wines they love and offer personal delivery.
5. Unique Pick-Up Experience – Club member pick-up in the parking lot of an open-air cheese market.

Many more great ideas:

- Use Coravin – To open library / limited production wines for tasting; Send club members a Coravin, so they don't have to open a whole bottle during virtual tastings. *Consider putting together a bundle that includes the Coravin in the pricing along with wines and/or other merchandise. Bundles/packages seem to sell well.*
- Stay Longer – Member can move to another location / picnic area if they want to stay longer after their tasting flight. *If you have the ability, save a couple of extra tables or outdoor areas for club members specifically for this reason.*
- More Time, More Benefits – We pay special attention and spend even more time with members. Also are offering a higher member saving amount so they are buying more wine. *If you have club benefits that are available now (like events or for out-of-area members), consider other benefits to attract and retain club members – beyond discounts. Shipping offers, virtual tastings, and other creative ideas:*
 - Free Tastings – Continue our seated tastings but now free for members (huge club benefit). Upper tier members get 50% off cheese or chocolate add on, people are staying longer, so they are ordering food.

- Food solution – Have a food truck out front so we are a destination, almost restaurant. The turnover is faster, smaller ticket average. Guests / members are looking for a different experience.
- More Space – We are considering leasing more space for members. *Are there other ways to create space for tastings – underutilized rooms, parking areas, outdoor spaces?*
- Embrace Virtual – Offering Virtual Tastings to members in small groups. This we can do no matter if the tasting room remains open or not. *Virtual Tasting is here to stay, so consider how to use it strategically – building brand, building relationship, extending sales opportunities, etc.*
- Build Real Relationship – Be proactive about checking in with club members and see how they are doing through these challenging times.

B. Full Triple Score during COVID-19

In light of our C19 operational execution challenges, what can we do to make sure we are still able to sell wine, sell new club membership and collect contact data (otherwise known as the WISE Triple Score) from as many guests as possible?

Selling Wine:

- Co-hosted zoom tastings with winemaker & sales person – to close sales, club sign ups *Having another person from the winery besides the ‘rockstar’ winemaker is a great way to ensure more interaction with a dialog but also having a sales-focused person will help with sales and club sign ups if the winemaker isn’t comfortable with sales.*

WISE Tip: Don’t let the fact that we are wearing a mask stop us from building rapport, noticing buying signals and all the other WISE best practices that set us up for natural, helpful sales.

Sign-Up New Wine Club Members

- Pre-Game ideas:
 - Streamline the brochure/info and sign up process for staff by pre-inputting reservation info into POS system
 - Have a club brochure/info laminated readily available on tables; if they are interested, we give them brochure (saves on having to throw away unused brochures).
- Referral Programs:
 - We’ve considered having club members bringing qualified guests in – creating some kind of referral program
 - Referral to club – tiered gifting based on # of referrals
- Sales Ideas:
 - Zoom tastings – get club sign ups
 - We’re offering a club tasting option, for example club-only exclusive wines – people see the option and inquire about it.

Capturing Contact Data

- Get contact data from beyond the reservation person – invite them to join up for email offers, updates at the winery, and more.
- Motivate team with wine points to get data from everyone
- More training with P/T staff to get them more confident, reminders, individually
- Find out beyond reservation person to get info on whole group – their interests to help to better sell to them, better experience
- Have more than one way to collect contact data. *If you only have one way to collect, you have potentially one way to fail. Try different ways of collecting data – ask your team what works best for them – and have multiples ways to collect to overcome one potential pitfalls on collecting.*
- Inviting people to join the mailing list based on their interests
- Reinforcing collecting contact data because “who knows what will happen” – keep guests informed of changes

WISE Tip: While collecting more data for C19 contract tracing purposes be sure to have each individual specifically state (check the box) if they also want to be contacted by the winery for general communications.

C. What happens if we have to close our Tasting Room again?

Top 5 ideas:

1. Shipping / Delivery / Pick-Up – get creative!

1A. Local Deliveries – be proactive!

- Proactive outreach by drop-off routes
- Free local delivery for members
- We would look at deliveries next time
- We will implement local outreach with delivery

1B. Curbside Pick-Ups – be innovative!

- Incorporate events into curbside pickup – we did a Mother's Day pickup that included flowers, chocolates, etc. that allowed us to partner with other businesses
- Curbside to-go with add-ons, like a band playing in the parking lot
- Have more curbside days (previously just once a week)

1C. Shipping – decrease the friction!

- Shipping incentives
- Probably would absorb shipping
- Looking at temperature-control options for shipping

- We do cold-pack shipping and eat the cost, and use two-day shipping as an upsell incentive
 - We are looking into shipping costs for 2-Day air upgrade, cold-chain options
2. Virtual Tastings – use leverage points (corporate, club members, occasions – anniversaries/birthdays, etc.)
 - Would also look at corporate relationships for virtual tastings
 3. Phone Sales – more, faster focus / redeploy TR staff quickly to phone
 - We shifted toward phone sales before. We'd probably do that again.
 - We didn't do phone sales or virtual before, just held them in our back pocket. Would implement if we had to close again
 - More targeted call / email outreach and include corporate customers
 - Start calling wine club members sooner
 4. Digital – continued emphasis, more advertisement
 - We had luck with digital advertising, especially Facebook – we sold some wine. FB is also good if you want to test something
 - We'll crank up online sales again
 - We would re-implement an email special of the week, which we did and it never lost momentum
 - We would try to be a little more sophisticated in our ecommerce next time around, more segmented and targeted with seasonal boxes

WISE Tip: The reason we have fire drills ahead of an actual emergency is so we all know what we are supposed to do and where we are supposed to go when emergency comes. It is important to plan now how to maximize all of these great ideas. Also, virtual tastings, phone and digital should be more active channels all the time / anyway . . . just saying!

Other Ideas:

- We had success before doing 1:1 small group tastings, where three couples would be in the same place, for example
- Our big event in August is a BBQ – trying to turn it into a drive-thru event
- Would also work on packaging/collaborating with local business

D. Sticky Wickets

The following areas were identified as common pain points. Here are some *WISE ideas* for your consideration:

Hop Spots	WISE Tips
C19 costs – staffing, cleaning, costs.	<i>We need to understand what it truly costs to run our businesses during this season of COVID so we can manage expectations and reset budgets as needed.</i>
Guests misbehaving – not following rules (masks and social distancing)	<i>Just like the fire drill conversation above, we need to plan ahead to how we are going to handle this. Our team members need clear direction from us about what guest can and can't do and how to escalate these situations.</i>
Managing social media – not enough time for staff to manage with everything else	<i>Bandwidth issues need to be taken seriously. Priorities (or resources available) during C19 may need to change.</i>
Staff Expectations – How do you manage dealing with staff who take vacations in ‘hot C19’ zones? If you ask to take a test or quarantine, managing staff hostility, HIPPA issues, etc.	<i>Important to get your policy set up now – so it does not become personal when the issues comes up. Find out what is legal and create your company policies based on those and communicate it.</i>