

# Oregon Wine Symposium

## February 21, 2017

### Measuring & Maximizing Your Wine Club & Events

*Presented by*

**The WISE Academy**

**Lesley Berglund, Sonyia Grabski & Liz Mercer**

**JOIN THE  
CONVERSATION**



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WISEAcademy

# INSIDE THE MIND OF THE CONSUMER

I DON'T SEE OUR  
BRAND OF PICKLE  
RELISH ANYWHERE.

INCONCEIVABLE,  
THIS IS A "BRAND  
LOYALIST."

TOM  
FISH  
BURNE



Accelerating **Careers.**  
Raising **Standards.**

REGISTER TODAY!

**Certification Classes**

**Mystery Shopping**

**On-Site Coaching**

**Guest Experience Design**

**Leadership Development**



W<sub>4</sub>

I<sub>1</sub>

N<sub>1</sub>

E<sub>1</sub>

C<sub>3</sub>

L<sub>1</sub>

U<sub>1</sub>

B<sub>3</sub>

# WBM / SVB Survey Says . . .

Wine Club Average Metrics	Southern Oregon	Northern Oregon	Total United States
Club Growth	13%	13%	14%
Annual \$ / Member	\$512 / year	\$725 / year	\$637 / year
Member Tenure	24.4 month	26.6 months	28.1 months
Member Discount	18%	17%	17%
Staff Commission	\$11 / sign-up	\$23 / sign-up	\$19 / sign-up
Annual Attrition	16%	16%	18%
Conversion Rate	4.0%	4.0%	4.0%
- Tasting Bar %	---	---	3.4%
- Seated Tasting %	---	---	11.4%

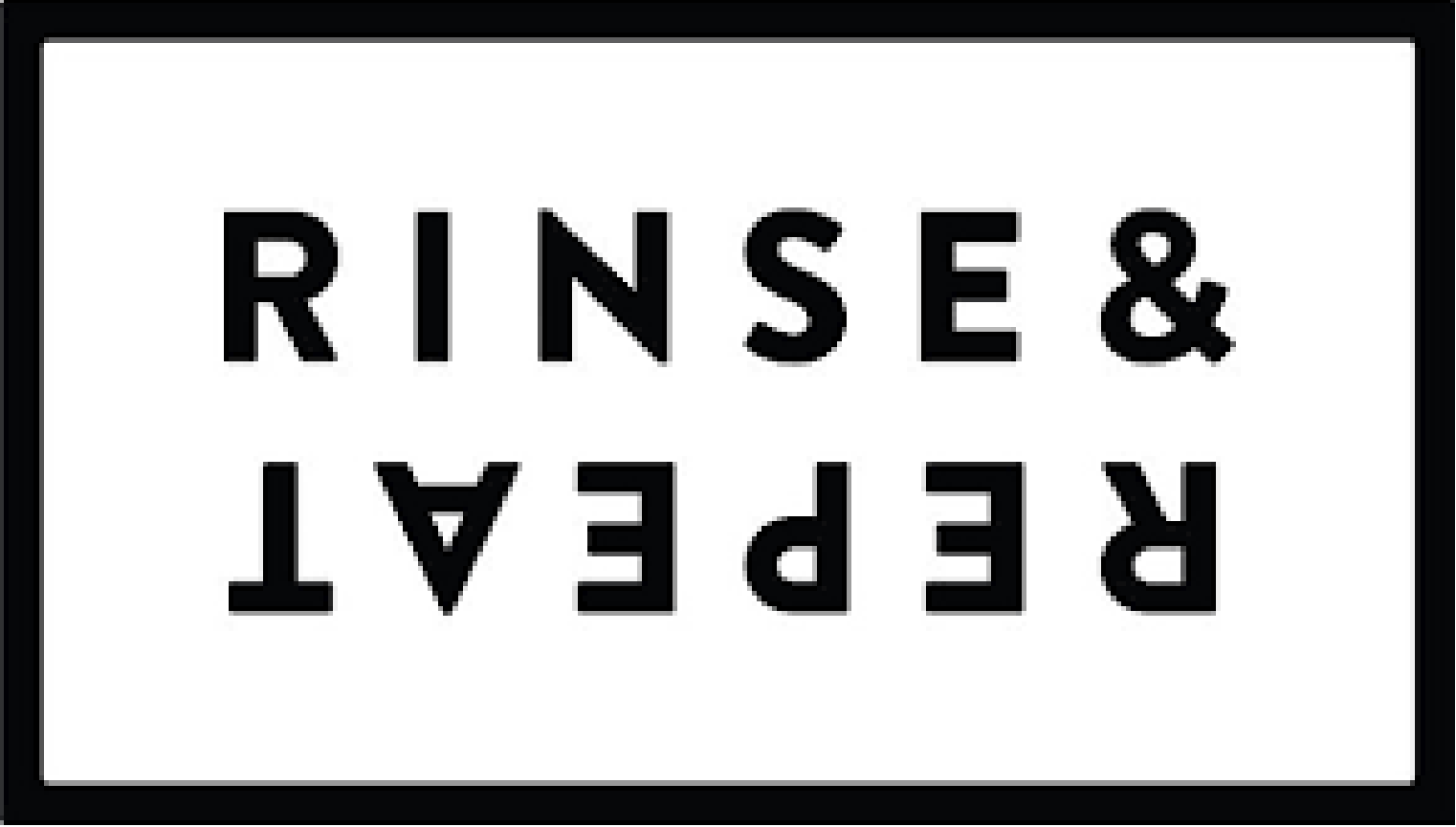
# WISE Mystery Shopping Results . .

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<b>Good News</b>	<b>February 2017</b>
Customer Satisfaction	High
Ask for the Order	90%
Service Heart	80%

<b>Challenges &amp; Opportunities</b>	<b>February 2016</b>
Compelling, Unique Brand Stories	40%
Silent Selling Materials	40%
Notice Buying Signals	30%
Open Ended Questions	0%
Positive Profiling	0%
Data Capture Efforts	0%
Wine Club Sales Efforts	0%

Entice. Convert. Retain.



**R I N S E &  
R E P E A T**

# Measure What Matters





# First Color Your KPI Dashboard



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# Maximize Wine Club Relationships

## Wine Club Appreciation Day

*Reservations required.*

- Estate closed to outside visitors for the day
- 2 Bands – Live music all day!
- 5 Food Stations– Paella, BBQ, Cheese, Salad, Dessert
- 1 Free Glass of JOLO wine!

RSVP today by calling 336-614-0030 or email us at [reservations@jolovineyards.com](mailto:reservations@jolovineyards.com).

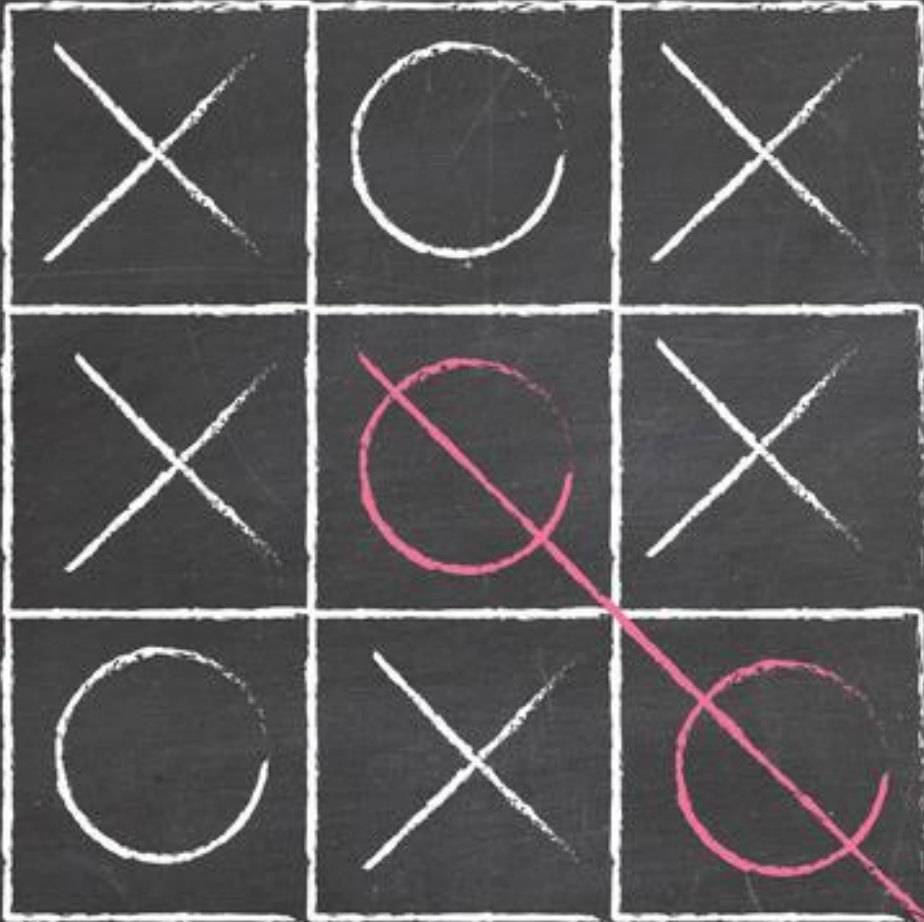


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THINK  
OUTSIDE  
THE BOX

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# TOWN HALL MEETING

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# WISE ACADEMY

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Wine Industry Sales Education

[WineIndustrySalesEducation.com](http://WineIndustrySalesEducation.com)  
Exhibit BOOTH #323

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