

**WISE  
ACADEMY**

Wine Industry Sales Education



OREGON  
WINEGROWERS  
ASSOCIATION

***Measuring & Maximizing Your  
Wine Club & Events***

Tuesday, February 22, 2017  
3:30 – 5pm



# WISE Academy Workshop

## Sponsored by Oregon Wine Growers

### *Measuring & Maximizing Your Wine Club & Events*

1. What Do You Measure Today?
2. Wine Club Dashboard Components
3. Wine Club Dashboard Case Study
4. Town Hall Best Ideas (Clubs & Events)
5. Wine Club Metrics Best Practices
6. Key WISE Lessons
7. More About WISE Classes & Services
8. More About WISE Coaches



# Wine Club Dashboard Components (2)

## Measure What Matters

### Membership Metrics – watch trends

- Membership size
- Track by club
- Track new member sources

### Mailing List Metrics

- Mailing list size
- Watch this just like club member list

### Conversion Metrics – Measure the Triple Score

- Buy wine
- Join club
- Join list
- By Channel (Tasting Room, Web, Phone, Events)

### Retention & Tenure

- Track passive vs. active members
- Track saves or conversion to custom club options
- Track quit reasons

### Attrition

- Project number of new members to offset
- Watch for both early attrition bubble and standard attrition bubble by club
- Track as an array instead of average
- Track attrition by team member

### Reactivation

- Plan campaign to reactivate former members (alumni)
- On-going alumni sales (life after club membership)

### More Sales Metrics

- Commissions by employee, by club
- % total members by club. % new member by club, by employee

### Operations Metrics

- Credit Card Decline Rate (initial and then final)
- Successful Ship Rate - % shipped vs. % failed
- Returns
- Shipping cost per package

# Wine Club Dashboard Case Study (3A)

## Scorecard for Success

Lesley's Winery	Actual 2014	Actual 2015	Actual 2016	Plan 2017
<b>Club Revenue</b>	\$621,000	\$840,600	\$937,800	\$1,862,200
<b>Club Membership</b>				
Beginning Membership	1,000	1,450	1,770	1,670
New Members	700	700	700	2,250
Lost Members	250	380	800	400
Ending Membership	1,450	1,770	1,670	3,520
Net Growth (loss)	450	320	(100)	1,850
<b>Mailing List</b>				
Beginning Mailing List	2,500	2,538	2,553	2,573
New List Contacts	50	25	20	400
Lost List Contacts	(12)	(10)	-	(50)
Ending Mailing List	2,538	2,553	2,573	2,923
<b>Conversion</b>				
TR Visitors	15,000	15,000	25,000	25,000
TR Club Member Sign Ups	500	500	500	1,750
Club Conversion Rate	3.3%	3.3%	2.0%	7.0%
Data Capture (Beyond Club)	5,000	5,000	5,000	15,000
Data Capture Rate	33.3%	33.3%	20.0%	60.0%
Web Visitors	50,000	50,000	20,000	50,000
Web Club Member Sign Up	200	200	200	500
Web Conversion	0.4%	0.4%	1.0%	1.0%
<b>Retention</b>				
Attrition Rate	25%	26%	45%	24%
% Reasons	75%	75%	50%	90%
# Saves / Custom Converts	0	0	0	0
<b>Operations</b>				
Shipments / Year	3	3	3	3
Club Shipment #	3,675	4,830	5,160	7,785
Successful Ship Rate	90%	90%	80%	95%
Club AOV	\$120	\$120	\$120	\$180
Reorder \$	\$0	\$0	\$0	\$10,000
Reorder # of shipments	-	-	-	50
Reorder %	0.0%	0.0%	0.0%	0.6%
Reorder AOV	\$0	\$0	\$0	\$200
Declines	368	483	1,032	389
Decline % (final)	10%	10%	20%	5%
<b>Online - Club E-Mails</b>				
% club members with email	90%	90%	99%	99%
% club open rate	25%	50%	50%	45%
% club click thru	15%	20%	5%	15%
% club unsubscribe	0.03%	0.03%	0.05%	0.03%

# Wine Club Dashboard Case Study (3B)

## Scorecard for Success

What is the good news?

_____	_____
_____	_____
_____	_____
_____	_____

What is the bad news?

_____	_____
_____	_____
_____	_____
_____	_____

What questions do you have?

_____	_____
_____	_____
_____	_____
_____	_____

Where should Lesley's top priorities be to grow her club?

_____	_____
_____	_____
_____	_____
_____	_____







# More About . . . (7)



## WISE Academy

WISE – which stands for Wine Industry Sales Education – offers a comprehensive curriculum for wine industry professionals. It is the only wine industry education, training and certification program dedicated solely to direct-to-consumer sales and marketing. Developed by more than forty vintners and industry experts, all classes are geared to increasing the expertise of direct-to-consumer (DTC) sales and marketing professionals while also igniting their passion for the role they play in a winery’s success.

Our courses are divided into three levels, plus an executive series, so we can meet the needs of everyone in the wine industry - from new industry enthusiasts to seasoned direct sales managers to winery CEOs. Founded in 2008, the WISE Academy is led by Chairman Lesley P. Berglund, a wine industry DTC pioneer and serial entrepreneur.

Based in the heart of Napa Valley, WISE also offers DTC and Leadership coaching and advisory services in Napa, Sonoma, Paso Robles, Santa Barbara as well as Oregon and Washington. For more information on services and for complete course descriptions go to: [www.WineIndustrySalesEducation.com](http://www.WineIndustrySalesEducation.com) or call (877) 740-WISE (9473).

## Upcoming WISE Classes in Dundee, Oregon

### **WISE #213 Wine Club Management Certificate**

June 5, 9 & 15 (three days)  
\$990 / Dundee, OR

### **WISE #211 Tasting Room Management Certificate**

June 8, 12 & 16 (three days)  
\$990 / Dundee, OR

### **WISE #111 Tasting Room Professional Certificate**

June 6, 7 & 13 (three days)  
\$700 / Dundee, OR

### **WISE #205 DTC Metrics Intensive**

June 14 (one day)  
\$850 / Dundee, OR

### **WISE #116 Outbound Phone Sales Mastery**

June 6 & 8 (two days)  
\$700 / Dundee, OR

## WISE Mystery Shopping Services Now Available in Oregon!

If you are interested in having WISE provide Mystery Shopping services for your winery, please contact [Shop@WineIndustrySalesEducation.com](mailto:Shop@WineIndustrySalesEducation.com) or call (877) 740-WISE (9473).

## More About . . . (8)

### Lesley Berglund

*Chairman, WISE Academy*

Lesley is an accomplished wine industry entrepreneur and CEO with a focus on change management. Over the past 25 years in the wine industry, she has started up the equivalent of nine new businesses, acquired and integrated four companies, and led during periods of dramatic change. As co-founder and former CEO of the Ambrosia Wine Catalogue/the Winetasting Network (which she sold in 2004), she has extensive experience in consumer direct marketing of fine wines. Lesley has served on the board of ten wine-related companies and trade associations and serves as co-chair of the Wine Industry Technology Symposium. In 2008, she co-founded the WISE Academy. In 2014 she co-founded SOLVE Services, which provides financial analysis, planning, and decision support services for wineries. Today, she spends most of her time coaching winery leaders through growth-related challenges and opportunities. Beyond wine, Lesley is a member of the Young Presidents Organization (YPO Gold) and serves on its International Forum Committee. Lesley is a third generation Napa Valley native from a grape growing family, with a BA from Wesleyan University and a MBA from Harvard Business School.

### Sonya Grabski

*VP, Sales & Marketing, Cornerstone Cellars*

With more than 15 years of experience in direct-to-consumers wine sales, Sonya is a prime thought leader and amplifier in identifying market trends, innovative DTC approaches in the wine industry, which includes wine sales programs and consumer targeting, acquisition and retention. Her programs are supported by effective and thorough marketing tactics to support long-term growth and profitability, for the company and brand's essential messaging. Over the course of Sonya's she has overseen DTC sales and marketing for Constellation Wines, Terlato Wine Group, Visit Napa Valley and is currently the Vice President of Sales & Marketing at Cornerstone Cellars. In addition to still finding time to coach a few winery clients, Sonya is also a faculty member of the WISE Academy.

### Liz Mercer

*Mercer Hospitality Consulting*

Having grown up in the Napa Valley, Liz always knew it would be her forever home. She spent eight years in the mid west (Detroit), before coming home to roost. With a unique background having a degree in Finance & Business Management, and 17 years' experience in Direct to Consumer Experience marketing, she approaches the multiple needs of the business balancing the business and guest needs. Her career includes time with Diageo and Pernod Ricard, followed by nearly six years with Gallo, and finally to a small family owned luxury brand. Liz can relate to the challenges faced by large, publicly traded wineries, corporate family owned wineries, and to smaller family owned brands. That breadth of experience has allowed Liz to see how different strategies work for different brands and implement the right solution. As a WISE Academy faculty member, Liz is an active content developer, instructor and key account coach focused on helping to grow the next generation of leadership in the wine industry.