

WINE INDUSTRY  
**TECHNOLOGY**  
SYMPOSIUM

# The Next Generation of POS and CRM Systems



**Pam Strayer**

Wine Country Geographic



**Janie Brooks Heuck**

Brooks Winery



**Anthony Harvell**

William Chris Vineyards



**Evan Pontoriero**

Fogline Vineyards



Amity, WV, Oregon

20,000 cases

25 acres owned/80 leased

70% DTC



# WineDirect POS

## Top Features

- Been with them since IBG
- Handled DTC growth from \$300K to \$2800K over 5 years
- Restaurant Features-Tips, Print
- Club Customization
- Loyalty Points
- Customer CRM
- Responsiveness

## Added Value

- Communication
- 2019 DTC Sales Report
- Continually Improving

## Supplemental Integrations

- Tock
- Ving Direct
- Vin Dashboard

# Future Needs

## **Segment, Segment, Segment**

- Outbound communication
- User experience on site and related messaging
- Promos
- Analysis and reporting
- Efficient
- Experiential/Emotion/Video

# Evan Pontoriero - Fogline Vineyards

- Winery and Tasting Room - Fulton CA
- Case Production: 1000 - 1200 annually
- Estate - 2 vineyards - 5 acres in Petaluma Gap
- Purchased Fruit: 3 vineyards (Russian River Valley, Dry Creek Valley, Rockpile)
- DTC: 90%



# Fogline POS/Wine Club Software

- Truvi Commerce
- Top Requirements: Good POS/CRM TR Interface, Excellent Wine Club Management, Fast Support.
- Problems Solved: Better Store-like Interface, Compliant Card Processing, Cross-sell and Upsell, Automatic Credit Card Updating.

# Fogline Challenges

- Utilizing All Features With Small Staff
- Dealing with Bugs of New Platform
- Consistency of Use (Errors based on Use Cases)
- No Current Appointment Booking



William Chris Vineyards  
Hye, Texas  
Anthony Harvell – Dir. Of Sales & Operations



Quick Facts:

2019 estimated cases bottled – 25k  
2020 estimated cases bottled – 35k  
600-700 tons of fruit/year  
30 acres farmed, 100 acres sourced  
DTC – 87% of revenue (8% wholesale, 5% custom work)  
4300 members, 16% attrition  
Membership waitlist since 2015  
52,000 wine tastings per year

# Commerce7

*William Chris*  
VINEYARDS

Other services: HubSpot, Tock, ShipCompliant, Facebook

Top Requirements: Mobility, multi-system functionality, scalable, customization/open API, inventory management, user choice options

Problems POS has solved/Cool Features:

Dynamic Pricing, Sticky Carts, Browser Based Application, Improved Inventory Management

# Commerce7

*William Chris*  
VINEYARDS

## Future:

Transitioning to C7 Reservations, Extended Club Customization, Automation of Club, ARR models

## Challenges:

Less mobile payment functionality than desired, still learning credit card updates, low speed internet drags the system, older devices become obsolete

## Plan to solve

Long overdue updates to devices, continuing to partner with the dev team to implement C7 reservations, C7 testing new credit card devices

# Featured Track - DtC Sponsor

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