

WINE INDUSTRY
TECHNOLOGY
SYMPOSIUM

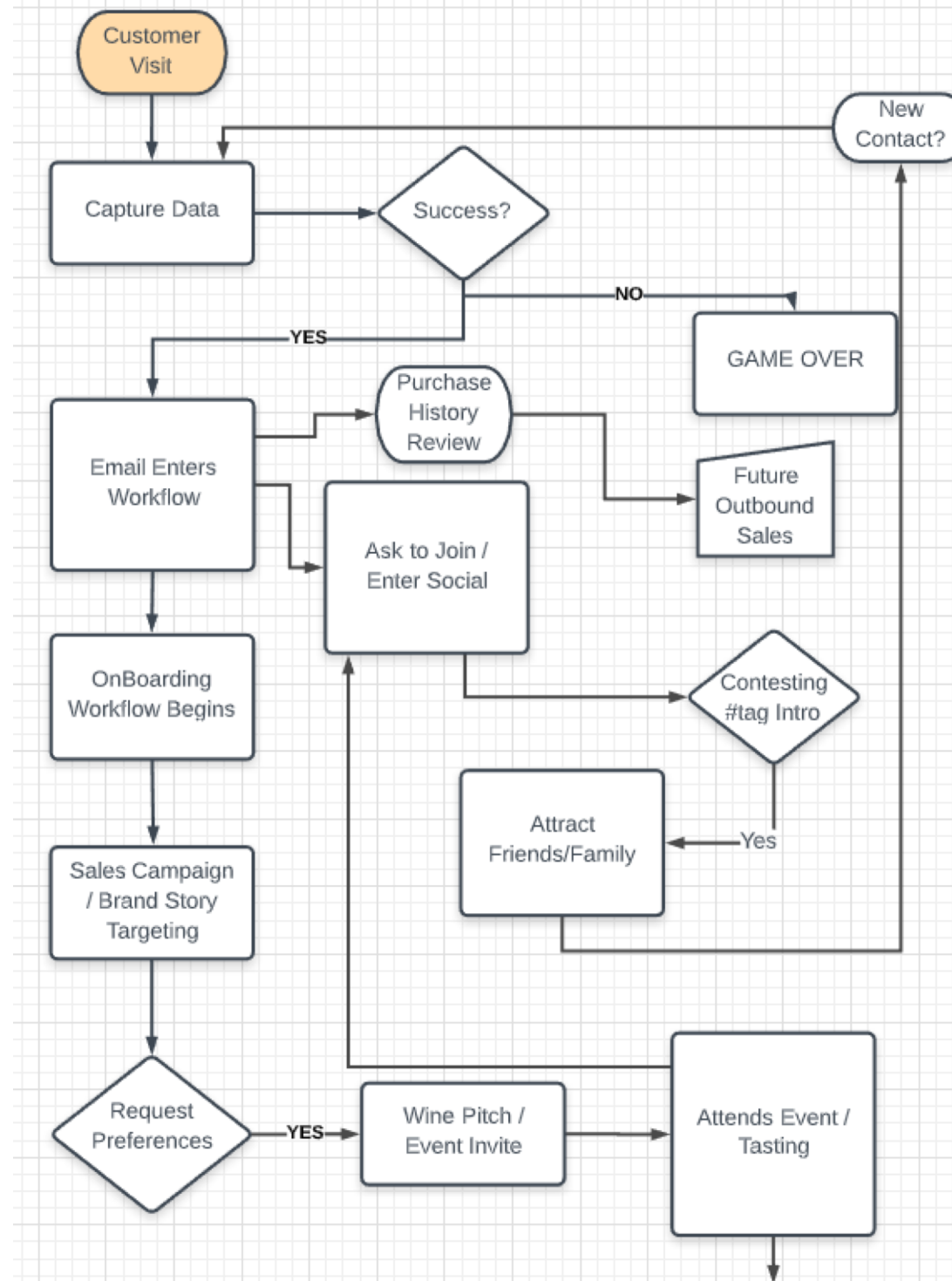
Featured Track - DtC Sponsor

WINE **DIRECT**

Strategy in Marketing: From Effective Data to the Right Workflows & Automation

- Moderator
 - Melissa Lynch, General Manager, Boisset Collection
- Panelists
 - Trevor Terrill, Marketing Manager, John Anthony Family Wines
 - Chris Grossman, DTC Ops Manager, Chateau Montelena
 - Chris Conover, DTC Systems & Ops Manager, Huneus Wines

Create The Path - Plan The Journey



Collecting Data? Just Ask.

- Do you already have the tools in place (CRM, online webform, social media account)? You just need to ASK the customer.
- Your current and future engagement strategies should dictate the type of data you aim to collect.

Data Collecting Strategies

Onsite Strategies

- Club/Allocation Signup (victory!)
- Email Signup.
 - Ask for more than email address.
- Email required for Wifi Access
- Death of Customer Zero
- Single Brand vs. Multiple Brands
- Buy-In for Your Team

Offsite Strategies

- Online Email Signup
 - Recent analysis showed that 35% of wineries asked for email address only online. ☹️
- Reservation System Opt In
- Social / Alexa!
 - Contesting / Giveaway (non wine)
 - Advertising pixels / utilization

Put Your Data To Use

Workflow Automation

- Why consider Email Workflows?
 - Five Key Benefits:
 - Efficient
 - Ensures consistency of timing and message.
 - Responsive to Customer.
 - Develop onboarding structure.
 - Variety of workflow opportunities
 - Keep lists clean

Other Data Considerations

- Email Content Tags
- Sales targeting with email copy and subject to appeal to a data point: age, season, collector, engager.
- Customer sale data can fuel outbound sales calls.

Case Study – Email Copy

Introducing our
**2018 NAPA VALLEY
SAUVIGNON BLANC**

"After ten vintages of Sauvignon Blanc, it's amazing what this wine has become."

– 2019, Winemaker Matt Crafton

2018 was a classic Napa Valley vintage in every sense of the word. Both lively and supple, this wine shows its youthful exuberance in fresh citrus and buoyant acidity. Ripe peach, guava, and honeydew dominate an incredibly effusive harmony of tropical aromas, with sporadic notes of the more classic Sauvignon notes of boxwood and fresh cut grass.

This small-production varietal is only available at the winery and on our website. Pre-orders are now available to ship on Monday, June 24th. To purchase this vintage while available, simply click below.

SUMMERTIME SAUVIGNON BLANC

"After ten vintages of Sauvignon Blanc, it's amazing what this wine has become."

– 2019, Winemaker Matt Crafton

Experience Napa Valley summer in a glass with our refreshing 2018 Napa Valley Sauvignon Blanc. Its youthful exuberance, complexity, and balance make it the wine of choice for those long, warm days ahead. Enjoy at your Independence Day gathering alongside our expert-inspired **Grilled Peach and Burrata Salad**, [full recipe available here](#).

This small-production varietal is available exclusively at Chateau Montelena Winery and on our website. To purchase this vintage while available, click below. **Order by 5:00 pm on July 1st and select an overnight shipping service for delivery prior to July 4th.**

In Closing...

- You can't try to create something without having the raw materials (data).
- Even with established systems and plans, you must continue to review results and adjust your sails based on customer interaction.
- Remember - a data point does represent a person.

Featured Track - DtC Sponsor

WINE **DIRECT**