

The background features a series of concentric, overlapping circles in light gray and white, some solid and some dashed, creating a sense of depth and movement. The circles are centered around the text area.

# Virtual Winery Experiences

## ROI CASE STUDIES

DTC Wine Workshops July 8, 2020 10:00-11:00 PDT

# SANDRA HESS

Founder, DTC Wine Workshops



DTC Wine Workshops  
GROW Direct to Consumer Sales



# TODAY'S AGENDA

- **Introductions**
- **Problem & Solutions during Pandemic**
- **Presentation of 3 Virtual Program Case Studies**
- **Moderated Discussion about Key Learnings**
- **Q&A**



WHEN LIFE  
GIVES YOU  
LEMONS  
MAKE  
LEMONADE

✓ Between March 18th and June 30th 2020 the consulting team at DTC Wine Workshops helped 412 winery teams with setup of Virtual Winery Offerings.



WHEN LIFE  
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- ✓Extended the Best Practices of Defining Meaningful Engagement Opportunities and Leveraging Consumer Journey Maps.



WHEN LIFE  
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✓ Provided Opportunities to Strengthen Partnerships, Lifestyle Marketing, Brand Storytelling.



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- ✓ Enabled Winery Teams with Tools to Pivot DTC Revenue from Tasting Room Channel to eCommerce and Telesales Immediately.

Zoom meeting interface showing a grid of participants. The main video feed displays a man in a white hoodie. A chat bubble reads: "From Jen Herman to Everyone what else happens in the honey...". The top bar lists participants: Sandra Hess, Debra Dickerson, Truffle Shuffle, Kristen Barnhise, and Cynthia Loehr.

Zoom meeting interface with a grid of participants. The title bar reads "Talking: Sandra Hess, DTC Wine Workshops". The main grid shows various participants, including Sandra Hess, Dee, Stacy Langon, Veronica & Tony Ertassi, Staci Tate, Hilda Hasserjian, Deb, and Kimberly and Tom. Two participants are shown as black circles with initials: JTT and JAJ.


Zoom meeting interface showing a grid of participants. The top bar reads "zoom.us Meeting View Edit Window Help". The main grid shows participants including a man holding a wine bottle, Sandra Hess, and others. A name "MICHAEL SARA" is visible at the bottom of one of the video feeds.

Facebook post from Mesa Park Vineyards. The text reads: "Mesa Park Vineyards was live. March 27 at 2:15 PM · Virtual Happy Hour with Mesa Park". The main image shows a man and a woman sitting at a table with wine glasses and a bottle. The post has 72 likes, 244 comments, 15 shares, and 2K views.

Facebook Live recording interface. The top bar says "LIVE on Facebook Recording". The main area shows a grid of participants in a video call. One participant is labeled "Ames Morison". The grid includes various people in different settings, some with wine bottles.

Facebook Live recording interface. The top bar says "Recording". The main video shows a man wearing a "LOCKE" cap holding a box of "Western Garden" seeds. The top bar lists participants: Sandra Hess, Info Locke, and kkau.





PEOPLE WILL FORGET  
WHAT YOU SAID.  
PEOPLE WILL FORGET  
WHAT YOU DID.  
BUT PEOPLE WILL  
NEVER FORGET HOW  
YOU MADE THEM FEEL.

*Maya Angelou*



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**TODAY, we will hear from three clients who have successfully pivoted to launch new Virtual Tasting Experiences and Events during a pandemic.**

- **Scott Klann, Winemaker and Owner of Newsome Harlow in Calaveras Wine Country represents a small, family brand.**



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- ▶ **Scott Klann**, Winemaker and Owner of Newsome Harlow in Calaveras Wine Country represents a small, family brand.
- ▶ **Andrea Meyer**, Director of Hospitality at Round Pond Estate in the Rutherford area of Napa Valley represents a mid-size brand.



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TODAY, we will hear from three clients who have successfully pivoted to launch new Virtual Tasting Experiences and Events during a pandemic.

- ▶ Scott Klann, Winemaker and Owner of Newsome Harlow in Calaveras Wine Country represents a small, family brand.
- ▶ Andrea Meyer, Director of Hospitality at Round Pond Estate in the Rutherford area of Napa Valley represents a mid-size brand.
- ▶ Brendan Finley, Executive Vice President Hospitality and DTC at Wente Vineyards in the Livermore Valley represents a large wine brand.

Scott Klann  
Winemaker/Proprietor  
Newsome Harlow Winery



# OVERVIEW

Newsome Harlow Winery

- **Tasting Room closed March 16<sup>th</sup>**
- **Announced first Virtual Tasting March 18<sup>th</sup>**
- **First VT April 1<sup>st</sup> - Over 150 viewers live and more than 2.2k since have watched first live VT**

# OVERVIEW

Newsome Harlow Winery

- **Weekly VT Live of FB/IG and NHVino.com Wednesdays at 6pm**
- **Weekly interviews of local personas (Innkeepers, winemakers, restaurateurs, marketers, etc) Fridays at 6pm**
- **Private tastings with members and friends via Zoom are available to schedule anytime**

# CHALLENGE

Newsome Harlow Winery

- **Unable to host guests in the tasting room due to Shelter in Place orders during a Pandemic.**
- **Primary need to stay relevant with brand loyalists and attempt to reach new audiences.**



# CHALLENGE

Newsome Harlow Winery

- A need to transition to eCommerce and Phone orders.
- Even for small wineries, it's still all about depletions. Grapes are still growing, harvest just around the corner.

# APPROACH

Newsome Harlow Winery

- **Tools: MeVo camera(\$349) & Ring Light (\$60). Live Broadcasting via Vimeo Premium(\$900).**
- **Important to monetize these efforts. Decided on three packs. Not too much wine to open and also have the wines last for two more days after Virtual Tasting.**

# APPROACH

Newsome Harlow Winery

- Wednesday tastings hosted by myself and daughter Sydney (23).
- Goals are always at least 40 three packs. After 14 weeks we've reached sales goals 11 of 14 weeks. Early results were up over 100 packs/week.

# VIRTUAL TASTING BUNDLE

04/15/2020

2017 Dalton Ranch Petite Sirah

2017 Aix Sponsa Vineyard Petite Sirah

2017 Mayben Vineyard Petite Sirah



# VIRTUAL TASTING BUNDLE

05/27/2020

## White Wine Gang

2019 Sauvignon Blanc

2019 Rosé

2018 Viognier



# VIRTUAL TASTING BUNDLE

05/13/2020

2018 Fumé Blanc

2016 Cabernet Sauvignon

2016 Merlot

## TEN BY TEN

SIERRA FOOTHILLS

# VIRTUAL TASTING BUNDLE

04/22/2020

2013 Shake Ridge Ranch Zinfandel

2013 Big John Zinfandel

2013 Frank Herbert Zinfandel



# VIRTUAL TASTING BUNDLE

05/20/2020

2014 Rough and Tumble Chardonnay

An Exclusive Release

2014 The Deviant

2014 Dalton Ranch Syrah



# VIRTUAL TASTING BUNDLE

Blend Your Own  
Deviant Wine!

06/17/2020

2017 Petite Sirah • 2017 Carignane

2018 Barbera





[Virtual Tastings \(early\) - https://vimeo.com/408164403](https://vimeo.com/408164403)

[Virtual Tastings \(recent\) - https://vimeo.com/427945759](https://vimeo.com/427945759)

[Interviews - https://vimeo.com/424557530](https://vimeo.com/424557530)

[Cooking Classes - https://vimeo.com/419101797](https://vimeo.com/419101797)

## SOLUTION

Newsome Harlow Winery

**#1 - Only recently have we begun seeing interest wane a little. Solutions have been to get more creative with tasting lineups. Verticals, Horizontals, Blending lineups have refreshed it a bit.**

## SOLUTION

Newsome Harlow Winery

**#2 - Plugged the VT's pretty heavily via live FB posts, video embedded emails. Have moved to video for roughly 50% of promotional communications.**



## SOLUTION

Newsome Harlow Winery

**#3 - Members get better pricing on all of this new world stuff. Also the private Zoom tastings are only available to members.**

# RESULTS

Newsome Harlow Winery

- Total Virtual Tasting program income over 14 weeks is more than \$50k.
- Additional sales related to shipping incentives resulting in additional three bottles or 9 bottles is over \$75k.
- Biggest victory is relevance and closer bond with NH loyalists. We were in their homes with entertainment and education weekly.

# RESULTS

Newsome Harlow Winery

- Currently working on future goals and how to keep the programming fresh.
- We will continue to be in this virtual space indefinitely.

Andrea Myers

Director of Hospitality  
Round Pond Estate

Round Pond  
E S T A T E



# OVERVIEW

Round Pond Estate

## Virtual Tasting Variations:

- Private, curated virtual tour & tasting
  - ▶ Daily by prior reservation
- Virtual Cooking Classes
  - ▶ Friday's at 4pm
- Partnership Offering
  - ▶ Live in the Vineyards goes Country + Round Pond Estate - May 30<sup>th</sup>

# CHALLENGE

Round Pond Estate

- Unable to host guests in the tasting room due to Shelter in Place orders during a Pandemic.
- Need to stay connected with brand loyalists and also serve new audiences.
- A need to recover POS revenue and transition to eCommerce and Phone orders.

# APPROACH

Round Pond Estate

## Program Goals:

- ✓ **Product Sales**
- ✓ **Club Conversions**
- ✓ **Engagement**

# APPROACH

## Round Pond Estate

### *Round Pond at Home*



#### Virtual Tasting Experiences

While the tasting room may be closed for the time being, we are happy to announce that we will now be offering virtual tasting experiences!

Booking your virtual tasting is simple:

- 1 Go to our website or your cellar and choose what Round Pond wines you would like to taste.
- 2 Click Book Now to find the date and time that works best
- 3 A team member will contact you to confirm the details for your tasting experience.
- 4 Get ready to enjoy your Round Pond wines from the comfort of your home!

[BOOK NOW](#)

### Virtual Cooking Classes



#### How to Make Ricotta Gnocchi with Chef Jamie

Chef Jamie will teach you how you to make delicious ricotta gnocchi, a current dish that is part of our Chef's Pairing gourmet wine pairing experience. A wine educator will also join him to discuss wine pairings and to answer any of your questions.



#### RICOTTA GNOCCHI COOKING KIT

Retail \$150 | Members \$128

[BUY NOW](#)





# APPROACH

Round Pond Estate

	PRIVATE	PUBLIC
Experience	Curated Tour & Tasting	Cooking Class that incorporates wine & gourmet products
When	Daily by reservation	Fridays at 4pm
Host(s)	1-2 Wine Educators	Wine Educator + Winery Chef
Price	Varies by wine	Complimentary
Guests	12 or less	unlimited
Sales Strategy	Tasting Kit + post-tasting offer for 24 hrs	Cooking kit – gourmet products used and wines to pair
Tech Used	Zoom	Mevo Camera, Vimeo software, Bluetooth speakers; streamed to Facebook, Instagram and YouTube
Startup Cost	\$15	\$1,350

# SOLUTION

Round Pond Estate

## ■ Modifications:

- ✓ Added 2<sup>nd</sup> host
- ✓ Incorporated tour of property
- ✓ Culinary support
- ✓ Screen-share
- ✓ Collateral

# SOLUTION

Round Pond Estate

- **Program Growth:**
  - ✓ Virtual Tasting appts made via phone while Educators were engaged in telesales
  - ✓ Online reservation system (TOCK) with easy, step-by-step instructions

# RESULTS

Round Pond Estate

## PRIVATE VIRTUAL TASTING RESULTS:

Total Virtual Program Income [60 days]: **\$78K**

- **\$55k Tasting Kits**
- **Post-Tasting Sales \$23k**
- **9 Club Memberships**

# RESULTS

Round Pond Estate

## PRIVATE VIRTUAL TASTING RESULTS:

Total Virtual Program Costs [60 days]: **\$180**

- Zoom monthly subscription for 5 Educators
- = One tasting to recoup costs

# RESULTS

Round Pond Estate

## **PUBLIC VIRTUAL TASTING RESULTS:**

**Total Virtual Program Income [6 classes]: \$15,000**

- Sale of cooking packs + sales post-class

**Total Virtual Program Costs [60 days]: \$1,350**

- Costs recovered after the first class
- Easter Meal Prep Class: 21 packs, \$5,500

Brendan Finley  
Executive Vice President  
Hospitality and DTC

**WENTE**<sup>®</sup>  
VINEYARDS



# OVERVIEW

Wente Family Estates

March 17, 2020 Virtual Program Launch Date

4 major experiences:

- Wine Wednesday with Niki and Aly Wente
  - ▶ Every Wednesday
  - ▶ Meet the Family and taste wines
  - ▶ Learn about the Family, Livermore and Wines





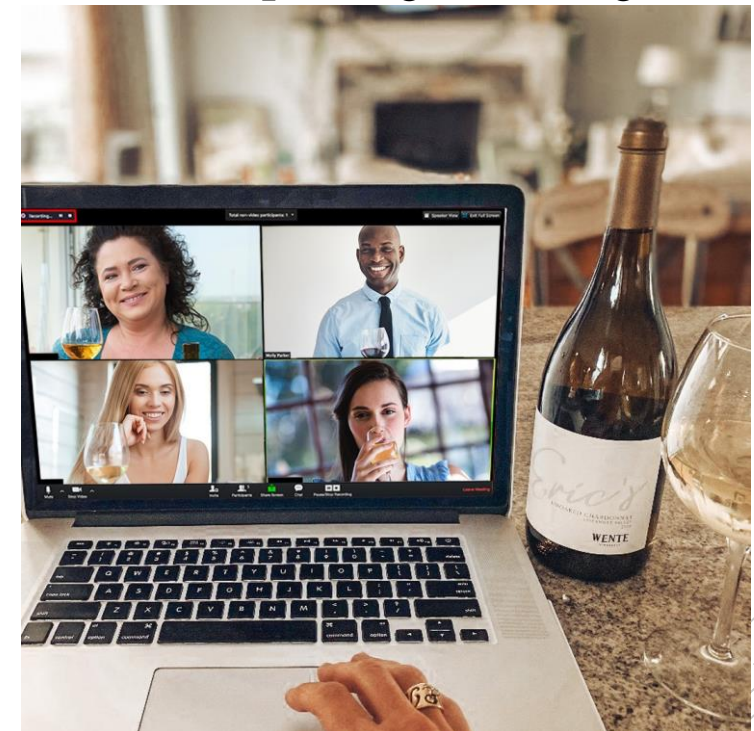
# OVERVIEW

Wente Family Estates

March 17, 2020 Virtual Program Launch Date

4 major experiences:

- Corporate Virtual Tastings
  - ▶ Booked by corporate companies
  - ▶ Select date and 1 of 3 wine package offerings



# OVERVIEW

Wente Family Estates

March 17, 2020 Virtual Program Launch Date

4 major experiences:

- Club Member Virtual Tasting MW
  - ▶ Taste club release with our winemaker Robbie



# OVERVIEW

Wente Family Estates

March 17, 2020 Virtual Program Launch Date

4 major experiences:

- Wente Alexa Wine Tasting
  - Engage at your leisure and learn about Wente and our wines easy purchase for delivery



# CHALLENGE

Wente Family Estates

- Unable to host guests in the tasting room due to Shelter in Place orders during a Pandemic.
- We had 2 large club shipments release that we would not be able to have for MW.
- With our Winemakers studio we had to cancel many private events.

# CHALLENGE

Wente Family Estates

- With our meetings and events we had to cancel all gatherings and events.
- Need to stay connected with brand loyalists and also serve new audiences.
- We have a lot of walk-in local business for wine purchase and could not accommodate.
- A need to recover POS revenue and transition to eCommerce and Phone orders.

# APPROACH

Wente Family Estates

## ■ WINE WEDNESDAY

- ▶ Investment: \$0
- ▶ We decided to use 5<sup>th</sup> generation and run through Facebook and Instagram.
- ▶ We wanted to engage in our distributors and local for a brand awareness and share stories.

# APPROACH

Wente Family Estates

## ■ WINE WEDNESDAY

- ▶ Our goal was to drive sales in off premise and engage with our club and loyalists.
- ▶ We decided every Wednesday would be a good mid week time @5pm.
- ▶ Each week invited a guests to share stories.
- ▶ Goal 20% e-commerce increase sales 24-48 hour post segment.

# APPROACH

Wente Family Estates

## ■ CORPORATE VIRTUAL EXPERIENCES

- ▶ Investment: \$500
- ▶ We invited our corporate clients, groups and any booked large parties that were booked for 30-60-90 days
- ▶ We offered 3 package option purchases. We send wine pre virtual date
  - ✓ We added recipe cards, and surprise delight gifts



# APPROACH

Wente Family Estates

## ■ CORPORATE VIRTUAL EXPERIENCES

- ▶ Our wine educators hosted with Chef on agreed date
- ▶ The class was a Wente history, wine taste and suggested easy at home food pairings
- ▶ Goal : Sell 3 Virtual Tastings 20% Club acquisition, \$100 Guest post purchase

# APPROACH

Wente Family Estates

## ■ ALEXA EXPERIENCES

- ▶ Investment:
- ▶ Reach new market with our flagship wines Morning Fog, Riva Ranch and Southern Hill Cabernet
- ▶ Customers would be able to order wine through their Amazon/Google device through InstaCard and drizzle

# APPROACH

Wente Family Estates

- **ALEXA EXPERIENCES**

- ▶ Drive consumer engagement and demand through multiple touch points
- ▶ Goal : 20% Club acquisition, \$100 Guest post purchase

## SOLUTION

Wente Family Estates

- After initial launches we have continued all 3 and have worked with our regional sales team in market to drive virtual tasting with their on premise accounts.
- E-commerce mix of sales was roughly 30% club purchase and 40% loyalists and 30% new. ( we launched new brand).
- Our e-commerce sales made up 50% of DTC Sales missed from rooms. Average of 15% sales came from Virtual platform.

## SOLUTION

Wente Family Estates

- Lesson learned we had low club attrition from virtual platforms.
- Lesson learned we did not call out any club specific virtual platforms we did that through our concierge call campaigns and reach outs.

# RESULTS

Wente Family Estates

One Month					
Virtual Campaign	Sales	Revenue	ROI	Goal	Results
Wine	Wine Sales	\$ 33,450	\$ 6,690	20% Pre Post Sales	10% in crease sales pre and post sales
Corporate	Corporate Virtual	\$ 7,000	\$ 4,970	5	5 virtual tastings
Corporate	Club	3 \$ 5,400	\$ 2,160	20%	4% acquisition 3 club 24 months lifetime
Alexa	Alexa	\$ 15,000	\$ 6,000		Sales from Alexa
Corporate	Corporate extra Sales	\$ 2,500.00	\$ 1,000	\$100 per guest re buy	Add'l corporate sales from Virtual \$65
		\$ 63,350	\$ 20,820	25%	33%

- Above represents one month stats
  - ▶ Results to date
    - ✓ We have increased wine sales from Wine Wednesdays to 15%
    - ✓ Corporate Tastings have increased in higher level packages and we have had 2 of the 5 repeat another event
    - ✓ Alexa has surpassed sales with drizzle now working and amazon
    - ✓ Our corporate virtual post purchase is still at \$65

# RESULTS

Wente Family Estates

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- ROI was paid back in first month
- Other measures of success
  - ▶ Brand awareness
  - ▶ Introduction to new vintages
  - ▶ Introduction to club and brands



# Moderated Discussion

Lessons Learned & Words of Wisdom



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Thank you!

[sandra@dtcwineworkshops.com](mailto:sandra@dtcwineworkshops.com)