

1. How to COVID-Proof Your Wine Club

... changes in structure, member benefits, customer service best practices, alternatives to events to consider.

WISE Note: Club members are generally our biggest fans. Finding ways to continue to make them feel special, and part of the winery family, is crucial, especially for those who can't visit. Here are your ideas gathered during Session #3.

A. Give 'em the Benefit(s):

- Scheduled tasting for members
- Extended times for members to taste
- Value add – include food / pairings / recipes / etc.
- Be diligent with engagement – social media on a regular basis
- Able to host an event, outdoors, large space for social distancing, pre-prepared plated foods – only do one annually, but considering doing more since it worked well
- *Consider your benefits – what's working in this environment and what can you adjust to entice and retain club members? Adapt the benefits to fit the new needs.*
- *Make club benefits obvious – both to potential new members but also to your members. Remind your members of their benefits so they are continually aware of why they are part of the club.*

WISE Note: Club benefits are what attracts and keeps our members, so if comp tastings and events are the only benefits, we may not be inclusive enough for those not local or not comfortable visiting right now. Consider benefits that would attract your guests to the club that is a good brand fit; do you have a referral program in place? Loyalty program? Nothing like getting a little something from my winery to show appreciation... just before the typical attrition timeframe comes into play

B. Round 'em Up

- Monthly drawing for new club members for a personal tasting with a winery owner family member either in person or virtual
- Didn't win the drawing? Buy this package and we'll set you up with a family member to do a private tasting for them
- People are still joining the club; attrition is not as bad as expected
- *Consider giving a window of opportunity to mailing-list (non-club) members a chance to try a few of the wine-club-only wines – one winery tried this and got some conversions to club, especially alumni club members re-signing up.*
- *Gift your membership perk to someone – club members can 'gift' the comp tasting to a friend/family member if they are not able/willing to come and taste wines.*
- *Referral program – reward existing club members if they bring a friend in, they get a little reward*

WISE Note: Let your raving fans do the work for you and share the love. Find ways to reward those who share the love and get even more love...and sales.

C. Dazzle ‘em

- Doing more Virtual with club members; weekly happy hours, one-on-one tastings – how do we make it more compelling/enticing
- Aloha Fridays – utilize our brand differentiator to compel our customers; never scripted always genuine, end with ‘what’s for dinner?’ 10 minutes with winemaker; share recipes and send it out to all the people who join... all about people connecting over a glass of wine and conversations

WISE Note: Virtual tastings are here to stay. How you deliver in the virtual space will depend on your brand personality, the makeup of your club/contact list, and your available internal resources. Be strategic – what is the purpose you are trying to achieve (retention, brand awareness, sales, etc.) and ensure your virtual tastings are meeting those goals.

2. Succeeding in Phone Sales

... from staffing, training, motivation, campaign management, and resources.

WISE Note: If it feels awkward, you’re probably going about it incorrectly. Whether asking for a sale in person, virtually, over the phone, etc. have it be an extension of service (how can you help them get what they need?) rather than feel like a used-car salesman approach (wink-wink, nudge-nudge). Here are your ideas gathered during Session #3... and some ‘WISE’ ideas.

A. Why Not?

- Difficult to have the resources to make the time to make outbound calls – short staffed
- Feels like being a telemarketer, not a part of our philosophy
- Staffing – not enough time in the day for everything, never mind having time to make calls
- *Consider reaching out to your advocates as a way to engage with them over the phone, in a personal way, so that you can provide a service that they may need. You won’t know what they need until you ask them. Have some go-to ideas prepared like delivering wine as an offer, bundles or new releases, shipping offers, etc.*

B. Staying Connected

- *Checking in with people is a really good way to retain members – if it is a genuine connection*
- *Don’t be fearful of calling during dinner (or ‘disturbing’ people with calls – make the call)*
- *Many more people working from home, so more likely they have flexibility to take a call*
- *Just ‘checking in’ works – great for engagement, retention and sales opportunities*
- *Linking authenticity to the superb service realm*

WISE Note: During this season of C19 we have a good reason to reach out and build even closer relationship with our club members. How are they doing? What can we do to help support them (i.e., virtual tastings, local deliveries, hold if needed, etc.)? People remember how they are treated, especially during challenging times.

C. Opportunities

- *Train the staff about inbound opportunities; teach them to upsell, knowledge of special promos, and to ask for the order / sale over the phone (not 'go to the website and purchase')*
- *Last-of-vintage has been very successful, a way to follow up on previous purchases/vintages – one of many types of offers to be 'of service'*
- *Remember, the offer needs to be relevant to the customer, so you're being of service and not feeling like a telemarketer*

3. Re-On-boarding/Re-Training Staff for these 'Normal Times'

... from staff training on the 'new normal', hiring during COVID, and more...

WISE Note: It takes more staff (dedicated cleaners and live phone coverage is a must) and more time between guest experiences during C19, so plan accordingly. Here are your ideas gathered during Session #3.

A. Hiring:

- Difficult to hire in a rural area and part time
- So much more to do now – almost twice as much work; need enough staff to have enough bodies to give people breaks
- Using social media to advertise, community colleges, club members, current staff members – *Ask your staff if they have anyone that has approached them about working for a winery. If you like your staff, you may also like their friends and/or acquaintances.*

WISE: Consider a social media campaign focusing on the benefits of working for your winery or reaching out to the hotel/restaurants locally who have staff looking for work

B. Designating – allowing staff to 'breathe' and focus on what they need to do in order to do the job:

- Host out front to be an 'air traffic controller' to give directions/protocols
- Designate someone to do the bussing/cleaning so staff can do what they're best at – engaging with guests, selling wine
- Morning meetings with team to get everyone on the same page – things are changing so often and we're moving so quickly we need to be conscious of making the time to meet

WISE Note: Have enough staff to handle the phones, bussers to help clean/clear between visits, etc. to make your operational creativeness even more effective and your team able to focus on the things they should – guests and the energy to do so.

C. Communications:

- Post updates for staff in 'backstage' areas so everyone can see protocols
- Have a binder with all the emails/communications that staff can review when they come in – helpful for part-time staff to catch up on any changes/updates – initial the updates so that managers can track who has read the updates – may need to re-refresh this



WISE Note: Staff needs and concerns are important. So, we need to pay attention. Give it careful thought. Take it seriously. There is no such thing as over communicating.

D. Reach out & Touch Someone...Virtually:

- Zoom happy hour to touch base with staff
- Making an effort to be mindful of touching base with staff – staff happy hours, time to talk and not about the winery/business

WISE Notes: A core WISE principle is first we need to take care of our team members so they can then take care of our guests.

THANK YOU, IDAHO, from all of us at WISE. We're here to support you!