

Proven Solutions for
Direct To Consumer Wine Sales

*Vino***PRO**
DTC SALES & SOLUTIONS

Big News for VinoPRO today!

- As of 11/6/12 (election day) we qualify for the 2012 Inc 5000 list – the list of the fastest growing companies in the United States.



CRM, Data Acquisition and Telephone Sales

- What is Customer Relationship Management (CRM)?
- What are Business Intelligence tools used for?
- Customer & Data Acquisition best practices
- The Real Story on Telephone Sales: Calling Customers creates long lasting Customer Relationships

Customer Relationship Management

- What is Customer Relationship Management (CRM) as it relates to the wine business?
 - CRM gives you a 360° view of each customer
 - Purchase habits & activities
 - Online
 - Tasting Room
 - Telephone
 - Manage ALL communications with customer base
 - Emails, offers, wineclub events, winery events, purchases
 - Advanced customer data management
 - Contact details (wc info, notes, likes, events, etc)
 - Buying habits
 - Family events, birthdays, anniversaries, weddings, vacations, etc
 - Product order details
 - Easy order entry

Customer Relationship Management (cont.)

- Solutions are VERY specific
 - Hosted – Salesforce.com
 - On premise/hosted – MSFT Dynamics CRM
 - “Free” – SugarCRM (Open Source)
- Integration Vendors
 - Salesforce ISV's & Integrators
 - Webfortis – MSFT Dynamics
 - Internal IT Resources

Why OMS vendors will always fail at CRM

- Business Rule #1: Do what you do well and FOCUS
 - OMS systems manage orders, not customers.
 - CRM systems manage customer interactions and relationships, not orders
- CRM solutions are VERY specific and always customized for each implementation
- CRM is advancing much more quickly as an industry – OMS vendors can't (and shouldn't try to) keep up
- OMS implementations don't accommodate customized solutions at all
- Integrations exist today that allow customers to use the best of class for each set of business requirements

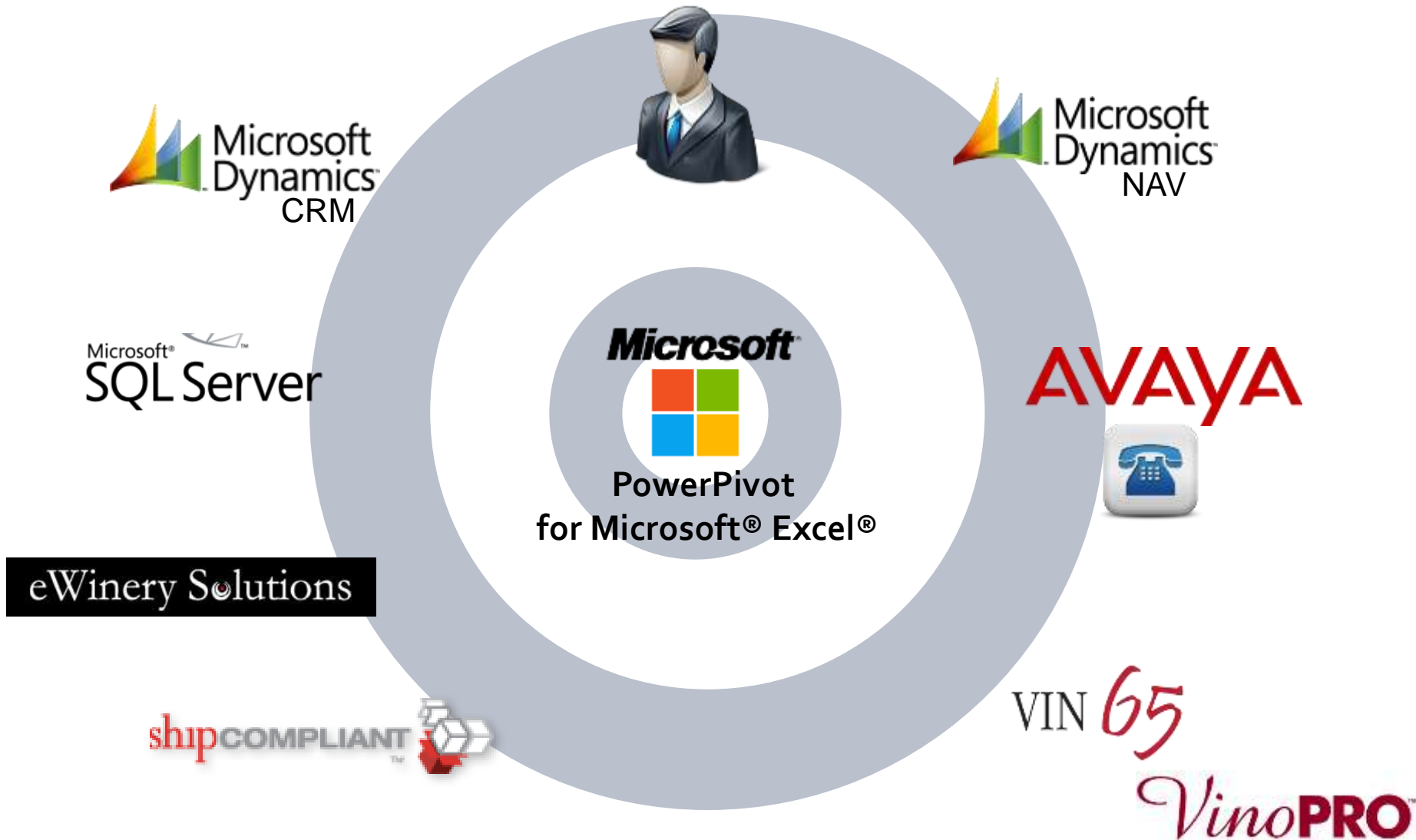
CRM Starts with Customer & Data Acquisition

- Tasting Room best practices:
 - Start now!!
 - Collect as much information as possible – make it fun for the visitor
 - What is the *real* value of phone number vs. email?
 - Knowing this fact, why are you only collecting email addresses?
 - TR Compensation Incentives increase data capture rate
 - Compare and contrast implementations
 - Benziger
 - Jackson/Treasury/Constellation
 - Be Creative. Measure everything. Change something and measure again. And again.

Telephone Sales build long-lasting relationships

- Calling and talking to customers creates stronger Customer Relationships
- Customers actually enjoy hearing from their favorite wineries
 - The Mechanics – who, how often, when?
 - Call Metrics – measure everything
 - \$/dial, DNC rates, WC signup rates
 - Salesperson productivity measurements
 - Advanced Business Intelligence – planning, budgeting, analysis/comparisons

Tying it all together with Business Intelligence Tools – PowerPivot



Business Intelligence – PowerPivot

The screenshot shows a SharePoint intranet page for 'PowerPivot' with the following elements:

- Browser Address Bar:** <http://intranet.provinowines.com/management/Pow>
- Page Header:** Includes navigation links for 'FRANC CRM', 'CAB CRM', 'cab', 'CabWebforms', 'CCR', 'CRM2011', 'FRANCWebForms', 'Google Apps', 'Hosting Control Center', 'Intranet', 'IP Office', 'MSDN', 'Pandora', 'PowerPivot', and 'Reports'. The user name 'Jeff Stevenson' is displayed on the right.
- Navigation:** 'Site Actions' menu with 'Browse', 'Documents', and 'Library' options. Breadcrumbs show 'Management > PowerPivot'.
- Left Sidebar:** Contains 'Lists' (Calendar), 'Libraries' (Documents, PowerPivot, Sales Contest Awards), and other site links like 'About this wiki', 'BOD Meeting', 'Management Meeting', 'OMS Reporting', 'Recycle Bin', and 'All Site Content'.
- Main Content Area:**
 - Call Counts 2012:** A large bar chart titled 'Sales' showing monthly data. Metadata: Last Modified By: Donnie Varner, Date: 6/15/2012, Created By: PROVINOWINES\elay. Below the main chart are three smaller thumbnail charts.
 - Calls:** A dashboard featuring a large data table with columns for 'Salesperson', 'Calls', and 'Sales'. Metadata: Last Modified By: STATION7 - Gene Davis, Date: 8/16/2012, Created By: Tim Kipper. Below the table are four smaller thumbnail charts: 'CallsbyWinerybyRep', 'CallsbyRepbyWinery', 'CallCount_WinerySales', and 'CallCount_RepSales'.
- Footer:** A 'Core' section with three small icons.

Summary

- CRM should provide a 360° view of customers
- Several solutions are available, need to choose the right fit & platform for your needs
- Business Intelligence tools tie everything together
- Calling customers creates meaningful relationships
- Start now with collecting as much information about customers as possible (including phone numbers!)

THANK YOU!