

# THE V FILES

May 2017 Edition



## WINERY: WALT WINES

380 1<sup>st</sup> St., West Sonoma,

DTC Best Practices  
Rating:



### ABOUT:

**THE V FILES™** is a monthly publication which offers an assessment and rating of wineries DTC performance in relation to overall guest experience and staff proficiency. Wineries are chosen at random by Mystery Shoppers and are evaluated using a scorecard approach leveraging DTC best practices. The ratings are based on how well each winery delivers a memorable guest experience and staff's ability to sell, covert and connect with customers.

The Rating System is based on performance in the following categories:

-  Inspirational Story
-  Connection w/ Host
-  Sales Acumen
-  Wine Club Conversion
-  Collecting Customer Info

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*Virtual Vines DTC Sales and Marketing Consulting Services help integrate DTC best practices to help wineries build brand awareness, increase sales and grow customer loyalty.*

For more information please contact us:

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Walt Wines, owned by vintners Katherine Walt Hall and Craig Hall, is dedicated to the production of premier Pinot Noir and Chardonnay from some of the Pacific Coasts most distinctive vineyard sites. Located on First St. in Sonoma Plaza, the tasting room is tucked away in a quaint cottage right off the square with tables inside and a lovely patio outside for tasting.

Across the board Walt offered our tasters excellent service form the introduction through the departure, and each visit warranted wine purchases and thumbs up as far as being referral worthy. Walt only offers seated experiences, which allow for a relaxing visit and more opportunity to converse and exchange in mutual dialog. The “feel” of the visit was very well timed, not rushed, and the hosts were attentive on each visit. The cottage was furnished and set up for tastings, it was organized and surroundings both in the tasting area and facilities were clean and inviting. The wines were well selected and explained during each pour had a consistent no nonsense, practical approach. Overall it felt casual and unpretentious. On all three occasions, a purchase was solicited (and wine was purchased) and our shoppers were bid adieu with thank yous and open invitations to return.

While our shoppers enjoyed the wines and had a lovely time during each of their visits, they didn't hear any passion or backstory on what the winery was all about and minimal effort was made to expand the connection after the tasting room visit. Mystery Shoppers reported wine club memberships were not solicited on 2 of 3 visits and only once was an email requested which was required for a shipping form. Cash and carry shoppers departed without being asked for contact info or any effort made to stay in touch post departure.

### WHAT THEY DID WELL:

Inviting, comfortable vibe/Host knowledge & Likeability/Buying wine/ Referral worthy

### AREAS WHICH NEED IMPROVEMENT:

Inspiration, Wine Club conversion & efforts to expand the relationship after the visit.

### DTC BEST PRACTICES RECOMMENDATIONS:

#### 1. WHAT'S THE STORY?

a. Build a story about the inception of Walt Wines— What is the inspiration? Integrate the story into all aspects of customer conversations and let each host adapt to their own style.

#### 2. INCREASE WINE CLUB CONVERSIONS:

- a. Club attributes more prevalent in tasting menu
- b. Hosts trained to sell value proposition of club during their discovery and as part of closing script
- c. Staff incented with bonus or commission on wine club sign ups
- d. Sales management issue monthly goals for wine club memberships and share/report in staff meetings

#### 3. CAPTURING CONTACT INFORMATION:

- a. Email /contact info prevalent on tasting menu and order forms
- b. Email receipt capability with POS system or during check out process
- c. Staff incentives to collect all guest contact info- Track/measure/reward

#### 4. CONSISTENT TRAINING/VETERAN REFRESHER PROGRAM:

- a. Professional selling skills- qualifying, connecting, converting, building loyalty
- b. Family story, regional terroir and relationship with offerings.