WISE WINERY CASE STUDIES

WISE Winery Success #1: Driving New, Substantial Growth

Winery Location (s):	Napa & Sonoma
Winery Brands:	More than Five
Winery Profile:	High End (bottle price points range from $50 to $150)

Winery DTC Footprint:

• Number of Tasting Rooms	Two
• Annual Visitor Traffic	20k and 25k annual visitors respectively
• Wine Club Size	10,000 club members
• DTC Staff Size (FTE) 0	Less than 50

WISE Services:

• WISE Cabinet Program	Yes
• WISE Certification Classes	Yes
• WISE Mystery Shopping	Yes
• WISE On-Site Coaching	Yes
• WISE Projects	Yes **

** DTC Projects have included: DTC Dashboard development, incentive comp design (staff and management), guest experience design (old and new experiences), brand mapping & storytelling workshops, training manual development, etc., annual budgeting and planning, executive coaching

WISE Results:

Before we started working with the winery three years ago it already had a large DTC business, but it had not been growing for the previous 10 years. By working with WISE, we have helped them achieve the following results over the last three years:

- Have grown DTC topline annual sales from $20mm to $37mm
- Club Size growth from 7,000 members to 10,000 members
- Club Conversion Rate increase from less than 3% to more than 8% of visitors
- Tasting Room traffic increased by 50%
- Tasting Room Wine Sale Conversion Rate increased by 25%
- Tasting Room Average Order Value increased by 10%

All full and part-time DTC employees attend WISE certification classes in their channel. On-going mystery shopping results sets the themes for custom on-site training done

An annual spend of $100,000 on all for the above WISE services has resulted in an ROI of more than 5000%. (They spend $100,000 per year on an average of $5.7 million in incremental DTC revenue)

WISE WINERY CASE STUDIES

WISE Winery Success #2: 100% WISE Certified

Winery Location (s):	Napa, Sonoma, Central Coast California
Winery Brands:	More than Ten
Winery Profile:	Various (bottle price points range from $20 to $200)

Winery DTC Footprint:

• Number of Tasting Rooms	More than 10
• Annual Visitor Traffic	Ranges from 10k to 25k annually
• Wine Club Size	15,000 club members
• DTC Staff Size (FTE) 0	More than 200

WISE Services:

• WISE Cabinet Program	Yes
• WISE Certification Classes	Yes
• WISE Mystery Shopping	Yes
• WISE On-Site Coaching	No
• WISE Projects	Yes **

** Past DTC Projects have included: DTC Dashboard development, Incentive comp design (staff and management), guest experience design (old and new experiences), training manual development, etc.)

Current program includes sending all full-time employees to WISE certified training classes (Tasting room, wine club, phone, and management classes) as well as bi-annual mystery shopping of all properties.

WISE Outcome:

By working with WISE, we have helped them achieve the following results over the last six years:

All employees have a lexicon and understand best practices and standards

- Employees feel more invested in the company that invests in them with more education
- Year-over-year improvements per property based on mystery shopping results
- Higher conversion rates (club, sales and mailing list sign-ups) for those employees with WISE certification:
    - o Have grown DTC topline annual sales
    - o Increased Club Size growth
    - o Club Conversion Rate increased
    - o Tasting Room traffic increased
    - o Tasting Room Wine Sale Conversion Rate increased
    - o Tasting Room Average Order Value increased

WISE WINERY CASE STUDIES

WISE Winery Success #3: Driving Strategic Change

Winery Location (s):	California, Oregon & Washington
Winery Brands:	More than Ten
Winery Profile:	Varies (bottle price points range from $20 to $200)

Winery DTC Footprint:

• Number of Tasting Rooms	More than 10
• Annual Visitor Traffic	Ranges from 10k to 25k annual
• Wine Club Size	15,000 club members
• DTC Staff Size (FTE) 0	More than 200

WISE Services:

• WISE Cabinet Program	Yes
• WISE Certification Classes	Yes
• WISE Mystery Shopping	Yes
• WISE On-Site Coaching	Yes
• WISE Projects	Yes **

** DTC Projects have included: Guest experience design (old and new experiences), management leadership workshops, onsite training across multiple properties annually, mystery shopping (phone centers and tasting rooms in all three states)

WISE Outcome:

By working with WISE, we have helped them achieve the following results over the last four years:

- Across multiple properties and departments, the company is now focused on a metrics-driven KPIs and making better business decisions based on the numbers.
- WISE classes are attended by new employees and managers, and periodic mystery shopping to determine content for annual on-site training and management meetings.
- New guest experience design improved overall guest satisfaction as well as increased conversion rates of sales and wine club sign-ups.

WISE WINERY CASE STUDIES

WISE Winery Success #4: Teaching Old Dogs, New Tricks

Winery Location (s):	Napa Valley
Winery Brands:	One
Winery Profile:	Bottle price points range from $30 to $90

Winery DTC Footprint:

• Number of Tasting Rooms	One
• Annual Visitor Traffic	Over 100k annually
• Wine Club Size	10,000 club members
• DTC Staff Size (FTE) 0	More than 50

WISE Services:

• WISE Cabinet Program	Yes
• WISE Certification Classes	Yes
• WISE Mystery Shopping	Yes
• WISE On-Site Coaching	Yes
• WISE Projects	No

WISE Outcome:

In the early days of WISE, this winery tested our WISE #111 Tasting Room Professional certification course to track the "WISE lift" by category of employee (for their high performers, good performers and low performers).

After attending the WISE #111 certification course, their high performers improved their sales performance (conversion rates, average order size and tips) by 25%, good performers improved by 15% and low performance showed no noticeable improvement.

Lessons learned include:

- Even top performers can improve, and
- WISE cannot resurrect your dead (meaning we can't fix employee misfit DNA issues).

WISE WINERY CASE STUDIES

WISE Winery Success #5: The Financial Turnaround

Winery Location (s):	Napa Valley
Winery Brands:	One
Winery Profile:	Bottle price points range from $20 to $90

Winery DTC Footprint:

• Number of Tasting Rooms	One
• Annual Visitor Traffic	6,000 annually
• Wine Club Size	1,000 club members
• DTC Staff Size (FTE) 0	More than 5

WISE Services:

• WISE Cabinet Program	Yes
• WISE Certification Classes	Yes
• WISE Mystery Shopping	Yes
• WISE On-Site Coaching	Yes
• WISE Projects	Yes**

** DTC Projects have included: DTC Dashboard development, annual budgeting and planning, incentive comp design (staff and management), wine club strategy, annual strategic planning retreats, monthly management team coaching sessions, executive coaching.

WISE Outcome:
Thanks to WISE coaching, this long-term client has experienced a complete financial turnaround from losing money to being solidly profitable for the past 6 years.

Everything starts with the numbers, from DTC Dashboard to bottom-up budgeting and financials planning. We have developed these and trained managers to use – our ongoing role is one of coach. During monthly coaching sessions we prioritize our focus for the next month, debrief on last month and continuously move the needle.

They also use WISE classes for new employees and managers, and periodic mystery shopping to determine content for small, pre-shift on-site team trainings during high season.

WISE WINERY CASE STUDIES

WISE Winery Success #6: Creating a Positive Sales Culture

Winery Location (s):	Napa Valley
Winery Brands:	One
Winery Profile:	High End (bottle price points range from $40 to $200)

Winery DTC Footprint:

• Number of Tasting Rooms	One
• Annual Visitor Traffic	15k annually
• Wine Club Size	5,000 club members
• DTC Staff Size (FTE) 0	Less than 20

WISE Services:

• WISE Cabinet Program	No
• WISE Certification Classes	No
• WISE Mystery Shopping	Yes
• WISE On-Site Coaching	Yes
• WISE Projects	Yes**

** DTC Projects have included: DTC Dashboard development, organization structure incentive comp design (staff and management), new guest experience design, wine club strategy and launch, training manual development, annual budgeting and planning, phone / list strategy, proactive traffic outreach campaigns, executive coaching.

WISE Results:

Before we started working with this winery, they were highly regarded for their quality guest experiences, but they were so busy “not selling” that they were forgetting to sell. We were brought in to create a positive sales culture, while not breaking the brand or other positive aspect of the winery culture.

By working with WISE, we have helped them achieve the following results over three years:

- Grew the DTC topline annual sales from $5mm to $10mm
- We launched their first wine club and grew it to 5,000 within 2 years
- Club Conversion Rate grew to 13% increase in less than 2 years.
- Tasting Room traffic increased by 34%
- Tasting Room Wine Sales Conversion Rate improved to 43%
- Tasting Room Average Order Value increased by 25%

We stepped in when the DTC manager was going out on maternity leave, and then kept working with them for three years.

We converted a high functioning All full and part-time DTC employees attend WISE certification classes in their channel. On-going mystery shopping results sets the themes for custom on-site training done. An annual spend of $100,000 on all for the above WISE service has resulted in an ROI of more than 1700%. (They spent $100,000 per year on an average of $1.7 million in incremental DTC revenue.)