ASSEMBLAGE
STRATEGY GROUP

CLIENT SPOTLIGHT

About The Client:

A luxury goods company with almost 50 years of winemaking experience in Napa Valley. The business produces over 100,000 9L cases annually that sell in both the DTC and Wholesale sales channels. They have an industry-leading club membership model and wholesale account placements around the globe.

Project Goals:

- **Architect an integrated commerce system in the company's DTC channels (POS, eCommerce, and Membership).**
- **Sunset a legacy system and migrating 250k+ customers, with their member statuses & order history.**
- **Create a more seamless transaction experience, both online and in the winery's retail setting.**
- **Integrate to a CRM solution for refining key metrics through dynamic dashboards and reports.**

Architected Solutions:

- **Designed a commerce system that includes an industry solution as well as Square Retail POS.**
- **Migrated 40+ years of customer & order history with deduplication process to ensure there was single a "record of truth".**
- **Integrated the Salesforce Sales Cloud to the commerce platforms for advanced CRM capabilities.**
- **Connected the CRM to the winery's fulfillment partner to track inventory by product and shipping location.**

Key Takeaways:

1. Successful implementation of integrated commerce systems for **best of breed client experience.**
2. Created **"a system of truth"** with CRM to ensure sync of all customers, member statuses, orders, and inventory.
3. Enabled **robust reporting capabilities** in the CRM for quicker analysis of trends for senior leadership team.
4. Deployed automated marketing tools with **dynamic list capabilities** for long term ROI potential.
5. Designed a **budget to actual capability in** the CRM for all sales by channel by product for fiscal periods.
6. **Project completed in less than one year –** from signing of agreement to go live date.