



CLIENT SPOTLIGHT

About The Client:

A luxury goods company with almost 25 years of winemaking experience in Napa Valley. The business produces over 10,000 9L cases annually, accounting for 80% of its revenue in the DTC channel and 20% in the Wholesale/Export sales channels. They have an industry-leading club membership model and key wholesale account placements around the globe.

Client Goals:

- Empower the sales team with clear monthly sales & member signup goals & align sales activities to these goals.
- Develop new customer lead sources that are more likely to convert at an appropriate AoV.
- Refine the commission's compensation programs for DTC team members to align with business growth goals.
- Create a more seamless online transaction experience in the winery's retail setting.

Architected Solutions:

- Ongoing:** Enabled a web functionality to allow for “private stores” for each sales ambassador to empower them with Outreach sales activities via phone, email, and in-person events throughout the USA.
- Ongoing:** Dynamically assigned, in the CRM database, existing customers to individual sales ambassadors for customer nurturing, inside sales outreach efforts, and existing customer referral efforts.
- Ongoing:** Created a quarterly incentive program of non-cash incentives to derive both revenue growth and membership retention
- Ongoing:** Continual role-playing with the entire team on building personalized customer relationships that lead to higher order values and longer customer lifecycles.

A	B	C	D	E	F	G
Palmaz Vineyards				Input Cells		
VINEYARD MEMBERS	01/01/23	02/01/23	3/1/2023	4/1/2023	5/1/2023	6/1/2023
All Member Tiers						
Active (on 1st day of month)	3,958	3,921	3,960	3,980	3,978	0
On Hold (on 1st day of month)	15	15	8	8	8	0
New (that month)	71	76	96	80	87	0
Cancelled (that month)	-108	-37	-76	-82	-134	0
Net	3,921	3,960	3,980	3,978	3,931	0
% Growth	-0.93%	0.99%	0.51%	-0.05%	-1.18%	-100.00%
FACON						
Active (on 1st day of month)	1,687	1,681	1,717	1,738	1,748	0
On Hold (on 1st day of month)	1	1	1	1	0	0
New (that month)	57	51	59	61	58	0
Cancelled (that month)	63	15	38	51	60	0
Net	1,681	1,717	1,738	1,748	1,746	0
CHACRA						
Active (on 1st day of month)	1,820	1,798	1,801	1,802	1,796	0
On Hold (on 1st day of month)	10	10	4	4	4	0
New (that month)	11	20	33	17	24	0
Cancelled (that month)	33	17	32	23	53	0
Net	1,798	1,801	1,802	1,796	1,767	0

Month	Communication Type	Audience	Campaign WHY?	Content Topic	Comm Date(s)	Event Date	Status
March							
Monthly Focus: 2020 Whites and 2021 Rose Member Shipment Winery Visit/Virtual Email							
Week 2	Email	Members (Both Clubs)	At YOUR Table - Quarterly Brassas wine and recipe email	Pairing 2019 PV Brassas with winter recipes Social focus	3/9/2023		Completed
Week 3							
Week 4	Email	Clients/Inactive Members	Spring Tours and Tasting - Book for spring and summer	All non members	3/28/2023		Completed
April							
Monthly Focus: 2020 White Wines offering to Non-Members							
Week 1	Email	Members (Both Clubs)	Summer and Fall Events email to Members	For Family Table, Big Pan and Asado	4/4/2023		Completed
Week 2	Email	Members (Both Clubs)	Reminder on Summer and Fall events		4/17/2023		Completed
Week 2	Email	Clients/Inactive Members	Revenue Opportunity with 2021 white wines to previous purchasers	2021 Chard Riesling Muscat Allocation	4/20/2023		Completed
May							
Monthly Focus: Paella Event Ranch Shipment Month							
Week 1	Email	Clients/Inactive Members	REMINDER EMAIL - Revenue Opportunity with 2021 anniversary wines	2021 Chard Riesling Muscat Allocation Reminder	5/4/2023		Completed
Week 2	Email	Vineyard Members	2022 Rose offering	Limited production Acquire now - Brassas Members with no spring shipment	5/12/2023		Completed
Week 4							

Key Takeaways:

- Successful implementation of weekly “sales-driven” meetings that include and empower all team members.
- Designed a retail sales approach to tasting experiences in the customer's home markets to drive customer referrals for sales and memberships beyond the business's retail setting.
- Enabled robust reporting capabilities through Google Sheets for quicker trends analysis for the leadership team.
- Deployed additional automated marketing tools with dynamic list capabilities for long-term ROI potential.
- The client has been working with Assemblage for almost five years, and revenue and membership retention metrics have continued to grow each quarter.

Turning Actionable Insights into Inspiring Client Experiences

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