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New York Wine & Grape Foundation

Winery Relationships with Retail, Restaurants and Wholesale

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R·I·T



Retail Relations

- Get to know each store individually
 - Who makes ordering decisions?
 - Who should be present at appointment?
- Set up an appointment
 - You call store directly
 - The wholesale salesperson calls for you



Retail Relations

- Walk around store to see where your wines or similar wines are located
 - Set up by region, grape or style?
 - Appearance of store, customer appeal, etc.
- Say hi to everyone, including the cashiers



Retail Relations

- Find out the store's needs
 - Gaps in certain price ranges or regions
 - May need at another time of year
 - Pricing. Markups?



Retail Relations

- Tasting with store staff
 - Temperature
 - Have as many people involved as possible
 - Chance to share the story - “passion”
 - History
 - Medals, Press
 - Food Pairings
 - Invitation to visit the winery?
 - Leave the open bottle? Unopened bottle?



Retail Relations

- In-store tastings
- POS
 - Backcards and displays
 - Shelf-talkers and neckers
 - Rebates
 - Logo materials
- Information packet with history, technical sheets, etc.
- Website access



Retail Relations

- Staff training
- Follow-up – See how wine is selling
 - By phone, email, snail mail
 - With account's salesperson
 - Additional assistance necessary?

- **QUESTIONS?**



Restaurant Relations

- Get to know each restaurant individually
 - Who makes ordering decisions?
 - Who else should be present?
- Set up an appointment
 - You call the restaurant directly
 - The wholesale salesperson calls for you



Restaurant Relations

- Look at menu and wine list ahead of time if possible
 - Theme? Emphasis on local food?
 - Set up by region, grape or style? Pairings?
 - Pricing
 - Wines by the glass
 - Appearance of restaurant, customer appeal, etc.

- Say hi to everyone



Restaurant Relations

- Find out about the restaurant's needs
 - Gaps in certain price ranges or regions
 - May need next month; supply?
 - Pricing. Markups?
- Tasting with restaurant staff
 - Temperature
 - Have as many people involved as possible
 - Chance to share the story - "passion"
 - History
 - Medals, Press
 - Food Pairings



Restaurant Relations

- Invite to winery?
- Leave the open bottle? Unopened bottle?
- Tastings in restaurant?
- POS
 - Table tents
 - Wait staff cards
 - Logo materials
- Information packet with history, technical sheets, etc.



Restaurant Relations

- Website access
- Staff training
- Follow-up - see how wine is selling
 - By phone, email, snail mail
 - With account's salesperson
 - Additional assistance necessary?



• **QUESTIONS?**



Wholesale Relations

- Hard decisions need to be made before deciding on whether to sell your wines with a wholesaler
 - Current winery production. Goals? Potential for growth? Expansion?
 - Pricing - Wholesale vs. “cellar door”
 - In-house staff?
 - Territory - Customer service overlap?



Wholesale Relations

- Choosing a wholesaler
 - Management - Communication
 - Wholesale Price Books - Gaps in certain price ranges or regions? New York representation?
 - Territory - Where? Duplication
 - Retail and restaurant coverage
 - Salespeople - How many? Their experience? Certifications? Training?
 - Delivery - Days? Own trucks?



Wholesale Relations

- Determine sales goals - examine market trends
 - Identify key accounts
 - Number of on-premise accounts. By the glass or flight options
 - Number of off-premise accounts
 - Total sales volume



Wholesale Relations

- Wholesale Support
 - Provide emergency contact information
 - Staff Training - Winery visit
 - Trade Tastings
 - In-store Tastings



Wholesale Relations

- Working with salespeople
 - Development of presentation
 - “Ride with” sales calls
 - Account potential
 - Opportunity to engage salesperson
 - Ordering decisions?
 - Who else should be present?
 - Tasting
 - Incentives?



Wholesale Relations

- POS
 - Backcards and displays
 - Shelf-talkers and neckers
 - Rebates
 - Table tents
 - Wait staff cards
 - Logo materials
- Information packet with history, technical sheets, etc.



Wholesale Relations

- Website access
- Follow-up – Over-communicate
 - By phone, email, snail mail
 - Management
 - Salespeople
 - Accounts
 - Additional assistance necessary?

- **QUESTIONS?**

