



Request For Proposal

Speakers for Day 1 & 2 Afternoon Workshop Sessions

January 11-12, 2017
Hilton Concord Hotel, Concord, CA

The goal of the DTC Wine Symposium Workshop Sessions is to provide a practical counterpoint to the more blue sky approach of the keynote sessions, offering attendees experience-based insights, data and tangible ideas that they can implement immediately. The quality of the workshop sessions is defined by useful content, specific examples with quantifiable data, and the presenters' public speaking skills.

Public speaking offers personal and professional development benefits including opportunities to:

- Showcase your skills and position yourself as an expert in DTC to other professionals and executives from around the country.
- Present your company/brand as a case study and best-in-class example of wine industry DTC strategies and practices.
- Network with other thought leaders in the field and build your contact list.
- Foster inspiration and innovation to overcome shared challenges and move the industry forward.

1. WORKSHOP TOPICS

#1: Leveraging Metrics: What, Where, When and How?

There is lots of talk about tracking metrics, but why? How and why is it important to your business and how can you leverage your data for success? This session explores best practices for how and when to collect, analyze and use this information for sales, marketing, retention and more. You'll hear how to develop and implement data collection strategies, and then translate these strategies into actionable intelligence to improve and optimize sales and marketing.

>> **Audience:** DTC Managers (tasting room, club, ecommerce) for small-large sized independently operated wineries; owners or senior-level executives looking to analyze current performance and benchmark operations and growth.

#2: Creating the DTC Dream Team – and Keeping Them!

As the wine industry and hospitality trends evolve, the key players on your DTC team must be dynamic and progressive. Are you teaching and mentoring skills and inspiring a 'strategic

mind' within your team? Are you fostering longevity and retention to avoid the pitfalls of turnover? Gain insight how to select successful candidates and develop a succession plan to implement within your winery's team. Learn how to plan for the future, define key roles and maintain consistent results when a key player departs.

>> **Audience:** Wine Club and Tasting Room Managers that supervise multiple tiers of employees; owners or general managers who oversee human resources

#3: Reservations Revealed: An Investigative Discussion?

What is the perceived value of reservations, versus the time and effort to market and communicate to consumers? What reservation programs are available and work well for the industry? Learn how to manage and integrate a reservation program into your consumer experiences. Hear from wineries both with established reservation programs, and hybrid appointment offerings to hear success stories across different vendors. Discuss how to implement or maintain a reservations program; the ease of use both internally and externally; and the importance of ensuring your consumers' information is secure. Join our experts for insightful takeaways on this hot topic.

>> **Audience:** Tasting room managers that deal with visitor appointment requirements; club managers from wineries with tasting rooms; owners or general managers from small, off-the-beat-path wineries.

#4: Private Client Sales – The Art of White Glove Customer Service

Customer service is the new marketing. Whether it's as broad as a tailored phone campaign or as exclusive as having a dedicated winery representative as your contact, how do companies of all sizes identify and execute this high-level and lucrative opportunity.

>> **Audience:** Tasting room managers; wine club managers from wineries with physical tasting room locations; marketing managers, general managers and owners from wineries that participate in in-person events; DTC managers from wineries leveraging phone sales

#5: Enhancing Your Digital Marketing Efforts

Learn about basic (and some free!) tools to help you grow your online presence, scalable to your digital comfort level and resources. Find out what SEO and SEM stand for, why (and which) response rates are important, what Google analytics and AdWords are, and how these tools and others can help you efficiently expand your digital landscape.

>> **Audience:** DTC managers from small wineries that control multiple sales channels; ecommerce managers from mid-large sized wineries seeking operational baselines; owners and general managers from small wineries that do not currently participate in web sales or have minimal web presence.

2. REQUIREMENTS FOR PROPOSAL

- **Present existing systems and experiences.**
Submit a written outline of your proposed presentation and be prepared to discuss during a phone interview with the Workshop Sessions Chair and Committee members. Your presentation should provide the following:
 - **Key Learning Objectives.** Clearly describe how your presentation will help attendees including philosophies, methodologies and examples. Include leading-edge or innovative content such as emerging trends, critical issues, systems and/or technology.
 - **Practical Application.** Provide 2-3 key take-aways that can be used by attendees in their day-to-day work, describe how ideas and methods can be transferred for use by others, and/or offer how-to insights to improve performance. Think of your experience as a case study.

- **Submit biography and photo.**
Include a short biography (less than 200 words) and headshot photograph. Your headshot must be in color, in a .tif or .gif file format, and by submitting this image you grant us the right to use your image for promotional purposes.

- **Adhere to all deliverables and due dates.**
You will be required to submit electronic deliverables, attend presentation dress rehearsals, and adhere to planning and event dates and deadlines set by the DTCWS Steering Committee.
 - The DTCWS Speaker Agreement must be signed and returned by **September 23, 2016**.
 - Workshop panel planning sessions via phone September-November. **TBD by each workshop's Moderator.**
 - Draft of presentation is due **October 14, 2016**.
 - **Participation in two dress rehearsals is mandatory;** if you know you cannot participate in both rehearsals, please do not submit a proposal.
 - **November 9, 2016:** First version of your presentation will be presented live to members of the DTCWS Steering Committee at Benson Marketing Group offices in Napa (out-of-area speakers may participate via phone conference).
 - **January 5, 2017:** Finished version of your presentation will be presented live to members of the DTCWS Steering Committee on at Benson Marketing Group offices in Napa (out-of-area speakers may participate via phone conference).

3. SPEAKER AGREEMENT

Upon acceptance by Workshop Chair, you will be emailed a Speaker Agreement to sign and return.

4. SPEAKER COMPENSATION

We offer the following compensation to our Workshop Speakers:

- Registration to DTCWS 2017 on January 11 & 12, a \$495 value.
- One night stay at Hilton Hotel, Concord, CA, a \$200 value.
- Reimbursement for mileage to and from event at federal mileage allowance rate. (Air travel will be determined on a case-by-case basis.)

Please submit all materials via email to:

Laila Subaie
DTCWS 2017 Workshops Chair
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800-366-9463 x 27