

## REQUEST FOR PROPOSAL

### Speakers for Workshop Sessions

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.

### SPEAKER BENEFITS

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
- Present your company/brand as a case study and best-in-class example of DTC strategies and practices
- Network with other thought leaders in the field and build your contact list, and
- Foster inspiration and innovation to overcome shared challenges and move the industry forward.

We offer the following benefits for confirmed Workshop Speakers:

- Complimentary registration to DTCWS 2018 on January 23 & 24, a \$675 value.
- One night stay at Hilton Hotel, Concord, CA, a \$200 value. The DTCWS Steering Committee manages the room block.
- Reimbursement for mileage to and from event at federal mileage allowance rate. (Air travel will be determined on a case-by-case basis.)

**The above benefits are only offered to confirmed speakers who deliver their presentations at the 2019 DTC Wine Symposium on Jan 23-24, 2019.** The Workshop Sessions specified in this RFP are intended but not final. It is possible that the Steering Committee may cancel a workshop session during the planning period (no later than the first rehearsal in November) based on interest and/or ability to recruit speakers.

### REQUIREMENTS FOR PROPOSAL

- **Present existing systems and experiences.**  
Submit a written outline of your proposed presentation and be prepared to discuss it 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; include 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 takeaways 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 (shoulders and above, color, in a .jpg, .tif or .gif file format). By submitting this image you grant us the right to use your name and 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.

  - Your workshop session proposal and the DTCWS Speaker e-Agreement must be completed by **Friday, September 14, 2018.**
    - [Click on this link to complete the e-agreement online.](#)
    - Proposals for workshop sessions must outline your direct knowledge and experience with the topic, providing relevant examples, metrics and 3-5 key takeaways that could be leveraged by intended audience to benefit or advance their DTC business. *Upon submission, your content is “proposed” and will be considered by the Steering Committee.*
  - Confirmed event speakers will be notified by **Monday, October 1, 2018.**
  - Workshop panel planning sessions may occur via phone **October-December.** Dates and times to be determined by each workshop sessions’s Moderator.
  - Draft of presentation is due **Monday, October 29, 2018.**
    - PowerPoint or Word document outline is sufficient. The point is to make sure we’re on track with overall content richness and points of differentiation among speakers.
  - Final PowerPoint presentation slide(s) due **Monday, January 14, 2019.**
  - **Participation in two dress rehearsals is mandatory.** Speakers located outside the North Bay may participate via phone conference. If you know you cannot participate in both rehearsals, please DO NOT submit a proposal.
    - First version of your presentation will be presented live to members of the DTCWS Steering Committee at Benson Marketing Group offices in Napa.  
**Wednesday, November 6, 2018:** Sessions 2, 3, 4, 5, 6, 7  
**Wednesday, November 14, 2018:** Sessions 1, 8, 9, 10
    - Final version of your presentation will be presented live to members of the DTCWS Steering Committee at Benson Marketing Group offices in Napa.  
**Wednesday, January 9, 2019:** Sessions 2, 3, 4, 5, 6, 7  
**Wednesday, January 16, 2019:** Sessions 1, 8, 9, 10

## WORKSHOP SESSION TOPICS

### 1. ***Wine Club Reimagined***

Family wineries derive the majority of their profit from wine club subscriptions, so club member retention is top of mind for owners and club managers. We tend to treat club members as irrelevant once they cancel but they are still engaged with wine and our brand. What can we learn about retention from successful subscription businesses? How do Blue Apron and Stitch Fix engage and retain members? Come to this session if you are ready to think differently about attrition and hear from leaders who are winning by challenging the definition of membership.

>> AUDIENCE: Owners, General Managers, Wine Club Managers, Marketing Managers

>> CONTENT LEVEL: Beginner, Intermediate, Advanced

***Please submit materials for this workshop to Tammy Boatright at [tammy@vingdirect.com](mailto:tammy@vingdirect.com).***

### 2. ***Competing in the Age of Amazon***

Much of what drives Amazon's success is their relentless focus on customer service, fueled by constantly experimenting, testing, learning, and iterating in order to provide the best possible experience for their customers. How are we in the wine industry competing with the changing retail landscape and delivering speed, ease, accuracy, personalization and customization? Hear from wineries that are taking a tip from the Amazon playbook and creating a culture that is nimble, agile and quick on its feet to innovate and enhance the customer experience.

>> AUDIENCE: Tasting Room Managers, DTC Managers, Digital Marketing Managers, General Managers looking for ways to stand out in an ever increasing competitive environment.

>> CONTENT LEVEL: Intermediate, Advanced

***Please submit materials for this workshop to Stacey Lawrence at [stacey\\_lawrence@b-f.com](mailto:stacey_lawrence@b-f.com).***

### 3. ***Not Your Mother's Marketing: Leveraging Influencers, User Generated Content, and Experiential Marketing to Drive Sales and Brand Awareness***

Gone are the days when the quality of the product alone determined a brand's success. Today, consumers rely heavily on online product reviews, word-of-mouth recommendations from friends and peers, and their own emotional triggers when making purchase decisions. This session will explore the latest successful marketing tactics and how wineries of all sizes can implement and leverage them, as well as challenges to be aware of.

>> AUDIENCE: Digital Managers, DTC Managers, Marketing and Brand Managers looking for techniques and strategies on implementing these trendy tactics.

>> CONTENT LEVEL: Intermediate, Advanced

***Please submit materials for this workshop to Stacey Lawrence at [stacey\\_lawrence@b-f.com](mailto:stacey_lawrence@b-f.com).***

4. ***We May be Small but we are Mighty: Small Wineries and Strategies for Success***

Managing a wine club, hosting guests, doing tours, planning events and executing digital marketing – it’s demanding on even the largest of wineries. In this workshop, small wineries will share their business models, organizational structures, techniques and creative solutions for how they get it all done.

>> AUDIENCE: Tasting Room Managers, DTC Managers, Event Managers, General Managers looking for creative ways to operate a winery with a small team.

>> CONTENT LEVEL: Beginner, Intermediate

***Please submit materials for this workshop to Stacey Lawrence at [stacey\\_lawrence@b-f.com](mailto:stacey_lawrence@b-f.com).***

5. ***You’ve Got Them – Now How Do You Keep Them?***

We all know it’s easier and less costly to keep the customers we have than to continually find new ones. In the case of wine club members, having a healthy retention rate is key to delivering future revenue. But how do you keep those members engaged? We’ll learn tips and techniques that keep club members longer, happier, and spending more dollars with you.

>> AUDIENCE: Wine club managers, DTC managers, general managers, owners.

>> CONTENT LEVEL: Beginner, Intermediate

***Please submit materials for this workshop to Meredith Hayes at [meredith.hayes@gloriaferrer.com](mailto:meredith.hayes@gloriaferrer.com).***

6. ***Driving ROI from Events***

Events are a terrific vehicle to create brand awareness and customer engagement, but how do you translate that into revenue? Event profitability is a challenge and executing the event often feels like more work than it’s worth. Hear from wineries large and small how they maximize event opportunities to drive customer engagement, positive social media buzz, and most importantly, revenue!

>> AUDIENCE: Event managers, wine club managers, tasting room managers, DTC managers, marketing managers.

>> CONTENT LEVEL: Beginner, Intermediate

***Please submit materials for this workshop to Meredith Hayes at [meredith.hayes@gloriaferrer.com](mailto:meredith.hayes@gloriaferrer.com).***

7. ***Wine Tourism: The Good, the Bad and the Ugly***

“Build it and they will come!” – well, not so much anymore. With increasing competition and a shift from wine “sampling” to “experiencing,” the tasting room landscape has changed in recent years. Getting foot traffic through the doors of your winery is more difficult than ever. In this

session we discuss the current data and trends in tasting room traffic, where we can find advantageous strategic partnerships, and how wineries large and small are filling their sales funnel to deliver on customer purchase and wine club conversion.

>> AUDIENCE: Tasting room managers, DTC managers, general managers, owners.  
>> CONTENT LEVEL: Intermediate

**Please submit materials for this workshop to Meredith Hayes at [meredith.hayes@gloriaferrer.com](mailto:meredith.hayes@gloriaferrer.com).**

8. ***Battle of the Membership: Wine Club v. Allocation Models***

Membership is the bread and butter for most wineries, but which model is most successful – traditional wine clubs or seasonal allocations? Do allocations generate more demand, and how do you forecast and manage inventory? Hear wineries compare the two models and share best practices for structure, benefits, inventory and CRM.

>> AUDIENCE: Wine club managers, DTC managers, general managers, owners, marketing managers, finance managers.  
>> CONTENT LEVEL: Intermediate, Advanced

**Please submit materials for this workshop to Stephanie Wycoff at [stephanie@affinitydte.com](mailto:stephanie@affinitydte.com).**

9. ***Storyselling: Capturing Customers and Sales Through Narrative***

Successful companies begin with a clear understanding of who/what they are and then communicate that through a compelling brand story at a macro level. But you can't stop there! Breaking the narrative down into micro stories that entertain and create emotional connection is what ultimately sells luxury goods including wine. Winning brands are those that stay true to their essence and leverage it across all customer touchpoints. In this session we'll discuss the benefits of a compressed and focused wine storytelling skill set, and how to apply this to your customer experience online and onsite.

>> AUDIENCE: DTC managers, marketing managers, tasting room managers  
>> CONTENT LEVEL: Beginner, Intermediate, Advanced

**Please submit materials for this workshop to Stephanie Wycoff at [stephanie@affinitydte.com](mailto:stephanie@affinitydte.com).**

10. ***Right Size Your Team & Optimize Your DTC Business***

Small wineries have a D.I.Y. growth strategy and operate with small teams trying to manage everything. Large wineries become so centralized that they operate in siloed departments and can no longer deliver with the speed and agility of a small winery. And medium wineries, well, wish them luck in figuring out when and how to add employees and launch new systems to manage their growth. In this session one winery shares how they maximize their small team and limited resources, and another shares its fast growth story and what their DTC operation looked

like then and now.

>> AUDIENCE: DTC managers, general managers, owners, marketing managers, finance managers.

>> CONTENT LEVEL: Beginner, Intermediate, Advanced

***Please submit materials for this workshop to Stephanie Wycoff at [stephanie@affinitydtc.com](mailto:stephanie@affinitydtc.com).***

## QUESTIONS?

For individual Workshop Session questions or proposals, please direct your inquiry to the contact provided above for that workshop.

For general Workshop Session clarifications on requirements or deliverables, please contact Stephanie Wycoff, Workshop Session Chair at [stephanie@affinitydtc.com](mailto:stephanie@affinitydtc.com).

For any other DTCWS inquiries please contact [dtcwinesymposium@gmail.com](mailto:dtcwinesymposium@gmail.com).