

## 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.
- Foster inspiration and innovation to overcome shared challenges and move the industry forward.

We offer the following benefits to our Workshop Speakers:

- Complimentary registration, one per speaker, to DTCWS on January 22-23, 2020, a \$700 value.
- One night accommodations at the Hilton Hotel in Concord, CA, a \$210 value, within the room block. *IMPORTANT: The DTCWS Steering Committee manages the room block. Speakers must reserve a room through the Steering Committee by the given deadline (November TBD) or risk having to provide their own lodging.*
- Reimbursement for mileage to/from the event at federal mileage allowance rate. Economy air travel will be reimbursed on a case-by-case basis, with advance approval from the Steering Committee. *Meals and other travel incidentals are not reimbursable.*

**The above benefits are only offered to confirmed speakers who deliver their presentations at the 2020 DTC Wine Symposium.** The Workshop Sessions outlined in this RFP are proposed but not final. The Steering Committee may modify or cancel a workshop session during the planning period, for any reason. Workshop topics and speakers will be confirmed in early October.

### REQUIREMENTS FOR PROPOSAL

- **Present existing systems and experiences.**  
Submit a written outline of your proposed content and be prepared to discuss during a phone interview with the Workshop Sessions committee. Your presentation should provide the intended audience with:

- **Key Learning Objectives.** Clearly describe how your presentation will help the audience; include stories, methodologies, specific examples and data to support your position. Consider yourself a “case study” and avoid generalities; the audience wants to know *how* you accomplished something and what the results were.
- **Practical Application.** Provide 2-3 key takeaways that can be used by the audience in when they return to the office/winery. Describe how your ideas and methods can be transferred for use by others. Offer how-to insights to improve performance. Again, think of your experience as a case study!
- **Provide a short biography and a professional-looking headshot.**

By submitting these files, you grant us the right to use your name and photo for promotional purposes.

  - Submit a short biography (200 words or less) in a Word doc. *Please name the file “YourName\_Bio”*. If your biography is more than 200 words it will be returned to you for editing before it is posted online.
  - Submit a headshot (in color, shoulders and above only) as a JPEG file. *Please name the file “YourName\_Headshot”*.
- **Adhere to all deliverables and due dates.**

***All speakers are required to submit electronic deliverables, attend workshop rehearsals, and adhere to the dates and deadlines set by the DTCWS Steering Committee. If you cannot commit to these requirements, please do not submit a proposal.***

  - Submit your bio, headshot, and workshop proposal by **Saturday, August 31, 2019**.  
*Please clearly state your interest in being either a panelist or a moderator.*
    - *If you are interested in being a panelist*, your submission must outline your direct knowledge and experience with the topic, providing relevant examples and 3-5 key takeaways that could be leveraged by the audience to advance their DTC business.
    - *If you are interested in being a moderator*, your submission must outline your direct knowledge and experience with the topic, providing relevant suggested questions and thought-starters that will pull the best content from the panelists.
    - Upon submission, your content is “proposed.” A member of the Workshop Sessions committee will be in touch with potential speakers in September to discuss proposals and begin to form the panel.
  - Complete the DTCWS Speaker Agreement by **Saturday, September 30, 2019**.
    - [Click on this link to complete the online Speaker Agreement](#).
  - Speakers will be confirmed by **Monday, October 7, 2019**. No speaker will be confirmed without a signed Speaker Agreement and commitment to attend both rehearsals.
  - Workshop planning sessions (informal, via phone) will take place **October-December**. Frequency, dates and times to be determined by the workshop’s Moderator and designated Workshop Sessions committee member (who participates in calls to make sure we’re on track with overall content richness and points of differentiation among speakers).

- **Participation in two formal rehearsals is mandatory.** These will be scheduled in-person in Napa/Sonoma to provide real presentation practice and to create synergy among the group. Rehearsals may be done by phone/video conference due to speaker locale constraints, and will be determined on a case-by-case basis by the Workshop Sessions Committee.
  - First rehearsal: **November 12-14, 2019.** *PowerPoint encouraged if ready.*
  - Second rehearsal: **January 7-9, 2020.** *PowerPoint required (includes speaker headshots and titles, at a minimum, if session has no other visual aids).*

**If you know you cannot participate in both rehearsals over the dates specified, please DO NOT prepare a speaker submission.**

- **Final PowerPoint presentations due by Sunday, January 12, 2020.**
  - Moderators are to consolidate speaker presentations into one complete file, proof/edit to ensure consistent formatting and proper use of DTCWS template, then submit to the appropriate Google Drive folder.

Our intended workshop sessions are listed below. You are welcome to submit a proposal for more than one session. The Steering Committee will select the best speaker lineup for each session with consideration of all submissions. Please note that priority will be given to new speakers as a result of attendee survey feedback and the Steering Committee's goal to present fresh content and perspectives at each symposium.

***The Steering Committee reserves the right to discontinue any speaker's participation in the conference at any time for any reason.***

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## WORKSHOP SESSIONS

### **TOURISM**

#### **Is the Traditional Tasting Room the Next "Blockbuster"?**

The internet didn't kill the video store, and e-commerce isn't killing tasting room wine sales. Or is it? With consumer purchases increasingly occurring online and tasting room visitation declining in many established wine regions, how are wineries responding? With an industry-wide emphasis on "experiences" over retail sales and challenges finding good, affordable staff, are tasting rooms now running more as a marketing expense than a profit center? Hear industry leaders consider the future of the traditional tasting room and share practical ways to drive your top and bottom lines.

- **COMMENTS:** Seeking speakers who represent urban tasting rooms (no winery attached), small wineries (DIY approach) and medium/large wineries (established infrastructure). Ideally this session will be a moderated conversational format with 2-3 panelists.
- **AUDIENCE:** Tasting Room Managers, DTC Managers, Finance Managers, Owner/GMs

- **CONTENT LEVEL:** Intermediate, Advanced

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

### **Hospitality & The Experience Overload**

Are we becoming too focused on blowing people's minds with new “experiences” and have we lost sight of the value in simply providing quality products and customer service? When is hospitality just delivering impeccable service consistently, and when is it a unique and transcendent experience? Hear from wineries offering new and interesting wine tasting experiences as well as those who create an experience through exceptional, albeit traditional, service.

- **COMMENTS:** Looking for best-in-class wineries delivering traditional wine tasting formats as well as those rethinking the visitor experience and offering something new in wine country. It would also be interesting to have someone (perhaps a moderator) who takes a dissenting position, opposing the hype of “experiences.” This could be a moderated panel of 2-3 speakers or individual presentations depending on how the content takes shape.
- **AUDIENCE:** Hospitality/TR/Event Managers, DTC Managers, Marketing Managers, Owners/GMs
- **CONTENT LEVEL:** Intermediate

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

### **Passport Events Evolved**

Bus loads of bachelorettes with fuzzy boas, and guests who indulge in excess – the large scale and passport-type events that bring in these consumers are exhausting and challenging to make profitable. In this session you’ll hear from industry experts who manage large events successfully and those who’ve pursued paths less traveled to market their brand and drive winery visitation.

- **COMMENTS:** The format for this session could be either a moderated panel discussion of 2-3 speakers, or individual case study presentations. Ideally we’re looking for one winery in each “camp” to share their strategy and tactics. It might also be interesting to also have an executive director of a regional association who organizes Passport events and can share best practices and a variety of success stories. Would love to have speakers from outside CA.
- **AUDIENCE:** Hospitality/Event Managers, DTC Managers, Marketing Managers, Owners/GMs
- **CONTENT LEVEL:** Beginner, Intermediate

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

### **MEMBERSHIP**

#### **Wine Club 360 – Part 1: Conversion Strategies & Tactics**

Membership programs provide a sustainable revenue stream which means club conversion is paramount to a winery's success at any size. How do wineries differentiate their club, achieve a competitive advantage, and exceed average industry club growth? In part one of Wine Club 360 speakers will share tangible, repeatable, adaptable strategies to achieving strong membership sign-ups.

- **COMMENTS:** Seeking speakers from small, medium, and large wineries who are excelling in club conversions, and are able to illustrate their actions supporting metrics of success.
- **AUDIENCE:** Wine Club Managers, Tasting Room Managers, DTC Managers
- **CONTENT LEVEL:** Beginner, Intermediate, Advanced

*Please submit speaker materials for this session to Brandon Allen at [brandon.allen@scheidfamilywines.com](mailto:brandon.allen@scheidfamilywines.com).*

### **Wine Club 360 – Part 2: Retention Success**

You've sold members on the dream, but how do you retain them for years to come? Retention often becomes second to conversion, when they really are two sides of the same coin – and since it's easier and more affordable to keep a customer than it is to acquire a new one, retention is critical! In part two of Wine Club 360, speakers will share the ins and outs of their retention programs and delight initiatives, and how these strategies and tactics combat attrition and grow their wine club.

- **COMMENTS:** Seeking speakers from small, medium, and large wineries who are excelling in club retention, and are able to illustrate their actions supporting metrics of success.
- **AUDIENCE:** Wine Club Managers, Tasting Room Managers, DTC Managers
- **CONTENT LEVEL:** Beginner, Intermediate, Advanced

*Please submit speaker materials for this session to Brandon Allen at [brandon.allen@scheidfamilywines.com](mailto:brandon.allen@scheidfamilywines.com).*

### **Alternative Membership Programs: When Traditional is not Always Tried and True**

In a market filled with options, consumers have more choices than ever before. Wineries are taking a hard look at their traditional wine club structures and questioning how they might stay competitive, leading to the adoption of alternative programming. From allocation/list models to "flexible purchasing" models, it's time to think differently about membership. Come to this session ready to learn more and consider a different wine club business model.

- **COMMENTS:** Seeking winery speakers who have either moved away from a traditional club model to another model, or are successfully managing allocation or list models. Speakers must share a deep dive into their specific models, defining and supporting how what they do is better than the common approach or the one they used to use. Formatted as 2-3 individual presentations.
- **AUDIENCE:** Wine Club Managers, DTC Managers, Sales & Marketing Managers, Owners/GMs
- **CONTENT LEVEL:** Intermediate, Advanced

***Please submit speaker materials for this session to Stacey Lawrence at [stacey\\_lawrence@sonomacutrer.com](mailto:stacey_lawrence@sonomacutrer.com).***

### **GENERAL DTC**

#### **Leveraging 3-Tier to Drive DTC Success**

Historically the 3-Tier and DTC channels have operated independently from one another, sometimes even viewing each other as competition. But in reality there are many opportunities for a symbiotic relationship between these business units, and for a winery that depends on both, a collaborative relationship is imperative. This session will share real winery examples of effective strategies that benefit both 3-Tier and DTC, as well as practical advice to get your stakeholders on board.

- **COMMENTS:** Looking for wineries that successfully leverage 3-Tier and DTC to drive each other and the business as a whole. Speakers must be willing to dive deep with practical examples and direct results. Ideally, this session would be formatted as either a group discussion or a presentation style of up to 3 people.
- **AUDIENCE:** DTC Managers, Hospitality/TR Managers, Marketing Managers, Owners/GMs
- **CONTENT LEVEL:** Intermediate, Advanced

***Please submit speaker materials for this session to Stacey Lawrence at [stacey\\_lawrence@sonomacutrer.com](mailto:stacey_lawrence@sonomacutrer.com).***

#### **Does Anybody Have a Map? Finding Success with Road Shows**

With more wineries than ever before and tasting room visitation declining in mature regions, some wineries are extending their experience beyond the cellar door and taking the show on the road. In this session we will explore how these travelling programs achieve success through regional dinners, in-home tastings, pop-ups and other meet-ups. Come ready to think outside the box, and outside your own backyard.

- **COMMENTS:** Seeking wineries that are successfully managing multi-state, “on the road” hospitality and/or wine club programs. Speakers need to dive deep and share practical examples and tangible metrics. In order to dive deep, this is likely best as individual “case study” presentations.
- **AUDIENCE:** Marketing Managers, Tasting Room/Wine Club Managers, DTC Managers, Owners/GMs
- **CONTENT LEVEL:** Beginner, Intermediate, Advanced

***Please submit speaker materials for this session to Brandon Allen at [brandon.allen@scheidfamilywines.com](mailto:brandon.allen@scheidfamilywines.com).***

### **The Psychology of Selling: Connecting our Passion to our Customer's Needs**

Do you know why people buy your wine, join or your wine club and refer their friends... or perhaps as importantly, why they *don't*? This session features sales experts sharing their unique approaches and best tips to help you increase your conversions in person and online. In this session you'll learn about purchasing behavior and how consumers' thoughts shape their decisions to do (or not to do) business with you.

- **COMMENTS:** Looking for 2-3 individual presentations by speakers with vast sales experience, with at least one speaker who can use examples from outside the wine business.
- **AUDIENCE:** Hospitality Managers, Wine Club Managers, DTC Managers, Marketing Managers, Owners/GMs
- **CONTENT LEVEL:** Intermediate

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

### **MARKETING**

#### **Send Better Email**

Email marketing is the single best way to drive online wine sales and continues to be an under-leveraged channel in the wine industry. We may know we should be sending email, but knowing where to start can be challenging. The good news is, great email marketing is accessible to wineries of all sizes and budgets. In this session speakers will share successful strategies and tactics they have implemented to drive DTC sales by sending better emails.

- **COMMENTS:** Looking for speakers of varying business/team sizes and budgets—ones that can share examples of their work and demonstrate success by way of data. Speakers do not have to be winery specific, but should be from a retail industry that focuses on consumer goods and experiences. Presenters will need to share specific examples of what was implemented, why, and the results, ranging from content creation, templates/layouts, marketing calendars, A/B testing, segmentation, utilizing in-house vs. external design or marketing firms, etc. Ideally, this session would be formatted as individual presentations with up to 3 speakers.
- **AUDIENCE:** DTC Managers, Marketing/Digital Managers, Brand Managers, Wine Club Managers
- **CONTENT LEVEL:** Intermediate

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

#### **Customer Service in the Digital Age**

With customer expectations higher than ever, smartphones always at our fingertips, and convenience trumping all else, consumers expect more ways to interact with a company than just phone and email. Digital tools such as chatbots, live chat, texting, SMS messaging, mobile apps, and online forums are all



becoming commonplace amongst many retailers. But what is the best choice and what considerations need to be made from an operations standpoint? In this session, you'll hear from wineries that added a digital component to their customer service, how they landed on the tool that was right for them, and the impact it had on their business.

- **COMMENTS:** Seeking wineries of all sizes that have implemented a digital form of customer service and the impact it's had on their business. Speakers should be prepared to share how they landed on their chosen tool, any data that led them to their decision, any obstacles encountered to implementation and how they solved for them, and the impact the tool has had. Sharing metrics and process will be key for this forum. This could be a moderated panel or individual presentations depending on how the content takes shape.
- **AUDIENCE:** DTC Managers, Digital Managers, Hospitality Managers
- **CONTENT LEVEL:** Advanced

*Please submit speaker materials for this session to Stacey Lawrence at [stacey\\_lawrence@sonomacutrer.com](mailto:stacey_lawrence@sonomacutrer.com).*

#### **Facebook & Instagram: From Social to SALES**

Social advertising has become one of the best ways to connect with customers, with Facebook and Instagram being leaders of the pack. In the past, these platforms were more about building awareness but now we know they can also be a powerful sales tool. But what are the key tools of each platform and how does one use them to create an effective strategy that generates ROI? Where do you allocate resources and how do you understand your analytics? In this session, we'll take a deeper dive into the "how-tos" of using these two platforms to drive actual return on investment.

- **COMMENTS:** Seeking social media experts who can clearly and effectively explain these two platforms and how they should be used to drive customers and sales to your brand using real examples, case studies and success stories. Ideally, this would be a panel of 2-3 presenters.
- **AUDIENCE:** Marketing/Digital Managers, Brand Managers, DTC Managers
- **CONTENT LEVEL:** Advanced

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

#### **Generational Marketing, Targeting & Segmentation**

With increasing attention being paid to capturing the Millennial market, a still highly engaged Baby Boomer audience, and a generation of X'ers that may have been forgotten, how can wineries approach product development, customer relations management, communication and marketing that appeals to the inherent generational differences of their audience? Hear from a panel of experts who are



segmenting their audience and how they have changed the way they interact with them based on their generational psychographics.

- **COMMENTS:** Seeking speakers who represent any retail business (not necessarily winery specific) who have successfully segmented their consumer base and implemented different programs or strategies based on the generation of their current or target audience. Examples can be related to product development, events, communications, technology, or marketing. Presenters need to share actual case studies of how they identified their plan, what the strategy was and the results. It would also be interesting to have someone who takes a dissenting position, outlining why segmentation may not be the wise choice. Ideally, this session would be formatted as individual presentations with up to 3 speakers.
- **AUDIENCE:** Marketing/Digital Managers, Brand Managers, DTC Managers, Owners/GMs
- **CONTENT LEVEL:** Intermediate, Advanced

*Please submit speaker materials for this session to Stacey Lawrence at [stacey\\_lawrence@sonomacutrer.com](mailto:stacey_lawrence@sonomacutrer.com).*

## QUESTIONS?

Please direct your inquiry to the contact provided above for the workshop(s) in which you are interested.

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