



Putting It All Together

Choosing and optimizing your marketing channels based on the customer journey.

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Objective of Today



- ✓ Understanding stages of the customer journey
- ✓ Why segment?
- ✓ What channels are in each segment?
- ✓ What are best practices in each segment?
- ✓ How do you know what segment or channel to focus on?
- ✓ Setting goals along the journey
- ✓ Knowing when your customer journey has changed

*Invest more in your digital marketing
than your landscaping!*



Segment Your Audience



Mailchimp Study



100.95%
higher

*email click rate when sending
segmented email*



STAGE 1

Awareness



STAGE 2

Interest &
Consideration



STAGE 3

Bottle
Purchase



STAGE 4

Repeat
Buyer



STAGE 5

Club Member

STAGE 1:

Awareness



*Find consumers looking
for a brand like yours.*

BEST PRACTICES:

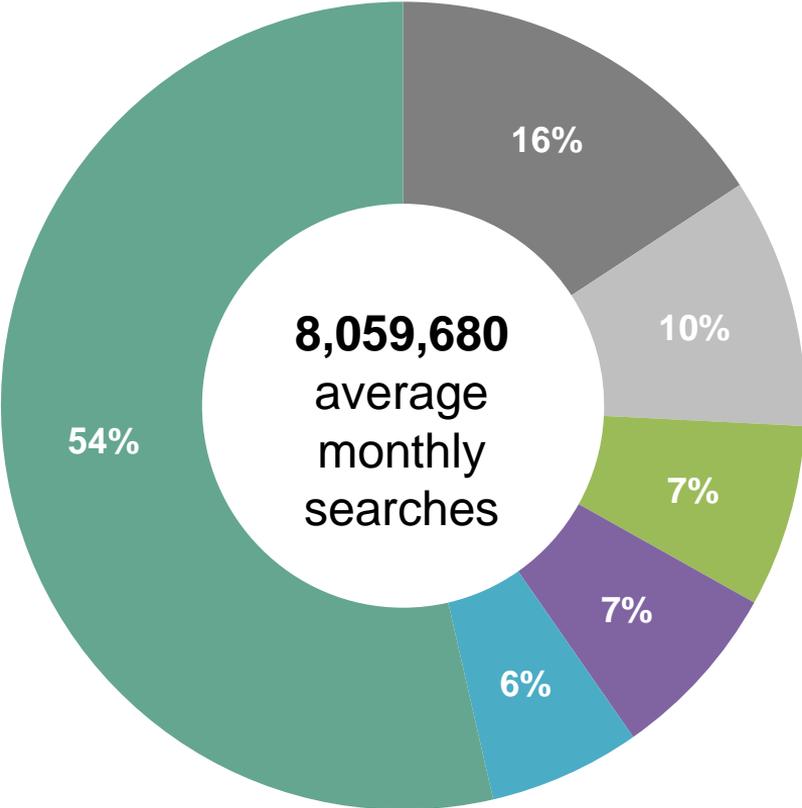
1. Google Search
2. Organic Social Media Posts
3. Community Engagement
4. Lead Generation Campaign

Search - What Does It Really Cost?

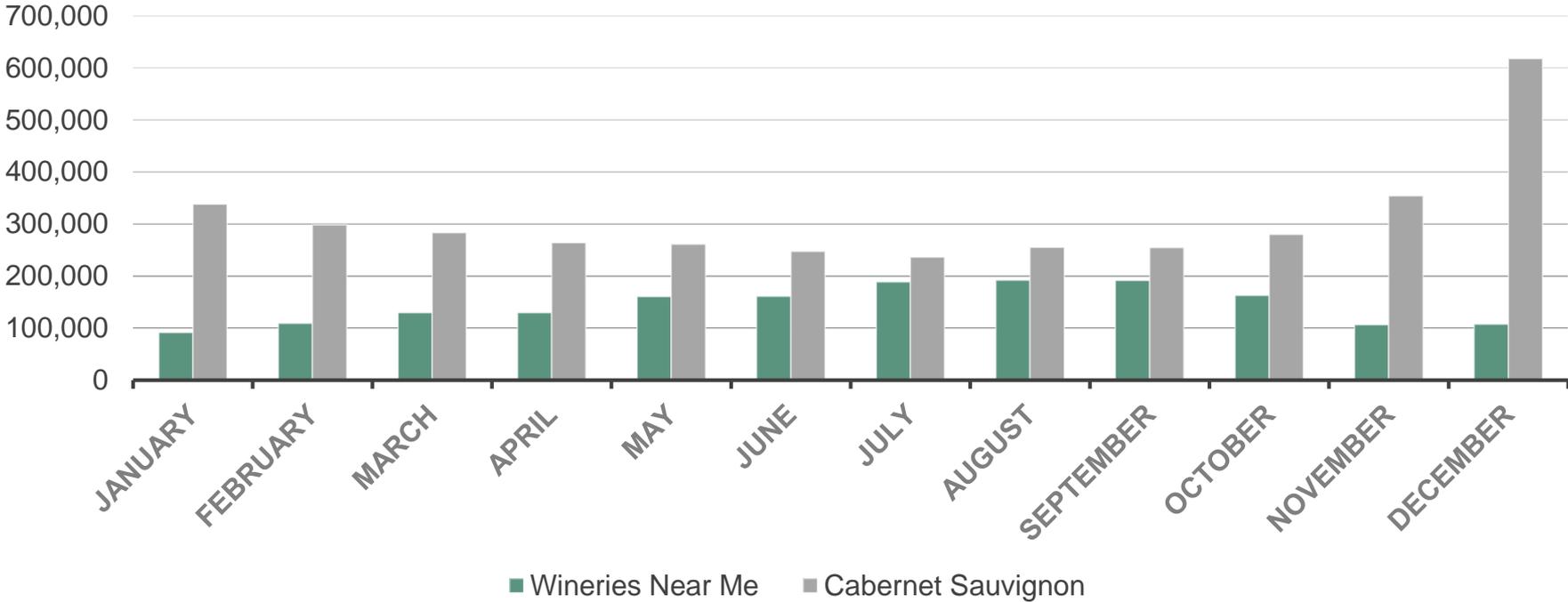
| SEARCH TERM | MONTHLY VOLUME | COMPETITION | TOP OF PAGE COST | PEAK MONTH |
|--------------------|------------------|-------------|------------------|------------|
| Wine | 550,000 searches | Low | \$1.65-\$3.03 | December |
| Wineries Near Me | 301,000 searches | Low | \$1.55-\$4.94 | August |
| Cabernet Sauvignon | 74,000 searches | High | \$0.79-\$2.97 | December |
| Pinot Noir | 60,500 searches | High | \$1.28-\$1.98 | December |
| Chardonnay | 60,500 searches | High | \$1.28-\$1.98 | December |
| Merlot | 40,500 searches | High | \$1.29-\$3.00 | December |
| Sauvignon Blanc | 40,500 searches | High | \$1.15-\$1.70 | July |
| Wine Tasting | 40,500 searches | Low | \$1.25-\$3.64 | July |
| Napa Wineries | 33,100 searches | Low | \$1.21-\$2.95 | August |
| Best Red Wine | 18,100 searches | High | \$0.75-\$2.61 | December |
| Canned Wine | 12,100 searches | High | \$1.01-\$5.64 | July |

Search Volume By State

- California
- New York
- Texas
- Pennsylvania
- Florida
- Other States

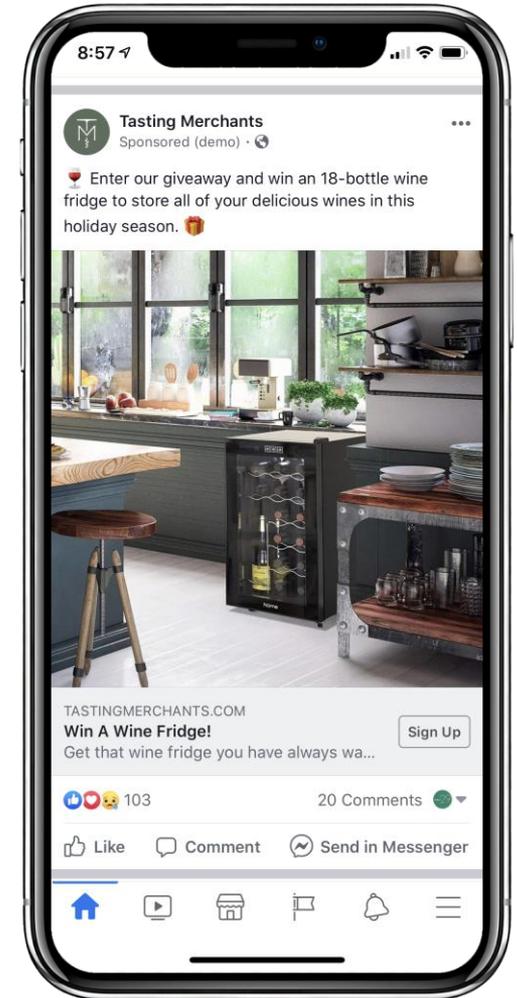


Search Volume By Month



Lead Generation Campaign

Use giveaways to target your ideal customer and give them a reason to interact with you.

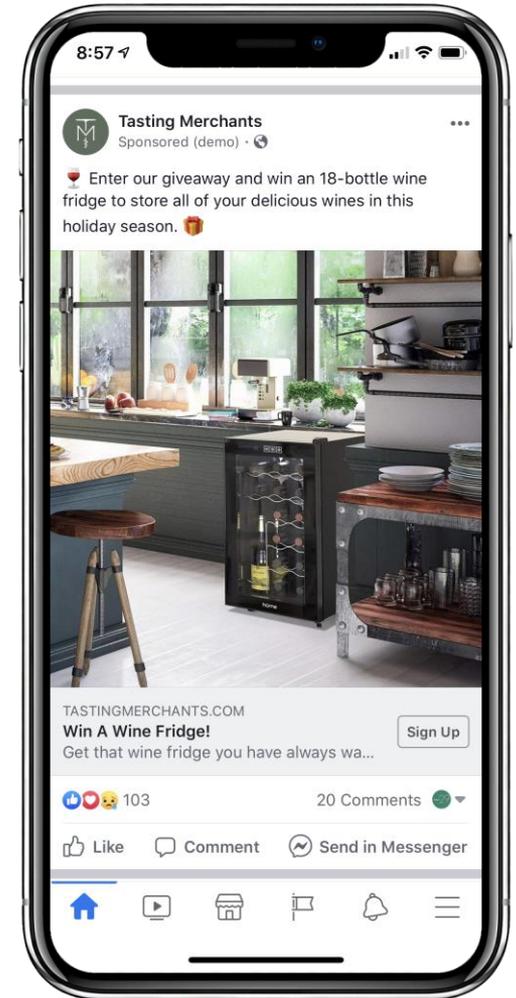


Lead Generation Campaign

10.26% *click through rate*

785 *emails captured*

\$0.70 *per lead*



STAGE 2:

Interest & Consideration



*Engage your audience and relay
your brand values*

BEST PRACTICES:

1. Blog on your website
2. Retargeting Ads on Facebook & Google
3. Onboarding Email campaigns
4. Instagram Stories

Instagram Stories

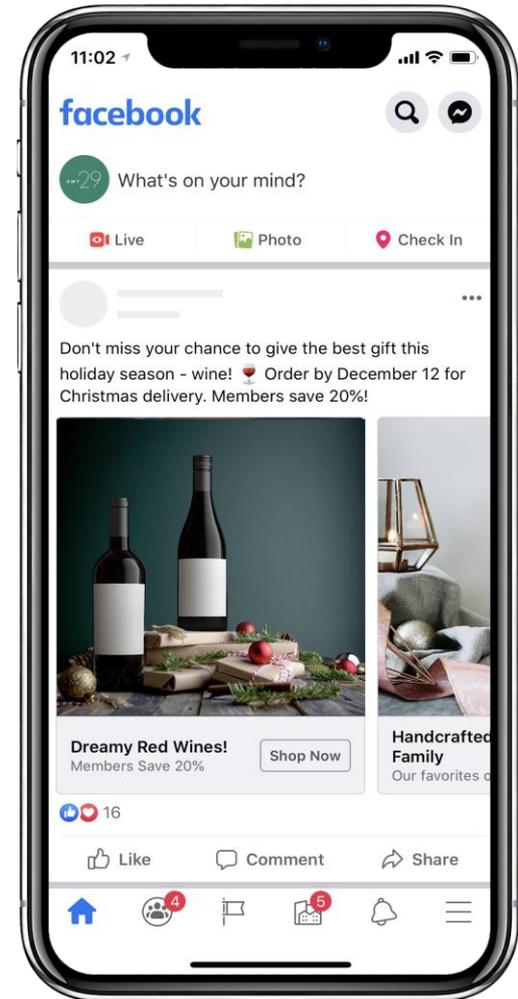


become more interested in a brand not the president after seeing it in stories



Retargeting Ads

*Retargeted your email list,
website visitors, and social
followers to ask for the sale
2.96 return on ad spend*



Stage 3

BOTTLE PURCHASE



Now the real work starts...

BEST PRACTICES:

1. Remember packaging
2. Extend the experience
3. Engage on Social + Email



3:28 / 8:10



Lumi

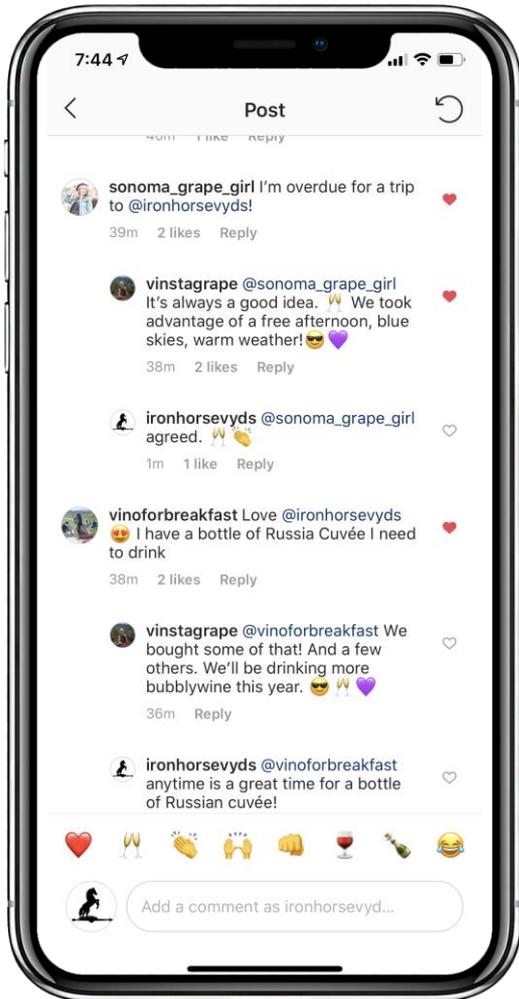
**ENGAGEMENT/EXPERIENCE IS KEY TO
GETTING CUSTOMERS TO REMEMBER YOU.**



CONNECTIONS ARE EVEN MORE IMPORTANT



will increase their spending with a brand when they feel more connected..*



PLACES TO ENGAGE:

1. Your own comments
2. Location tags
3. DMs – both from connections, and secret DM's in IG
4. Their own content (not just about you)
5. Tagged content, that others comment on

Stage 4

REPEAT BUYER



Helping your customers feel cared for moves them into this loyal stage of repeat business and brand advocacy.

BEST PRACTICES:

1. Get to know your customer
2. Connect on a personal basis to create brand advocates
3. Social Media / Retargeting for new releases



USER GENERATED CONTENT

1. Great for engagement and content curation
2. ALWAYS ask to use content
3. Give credit
4. Don't include the watermark from reposting apps



Stage 5

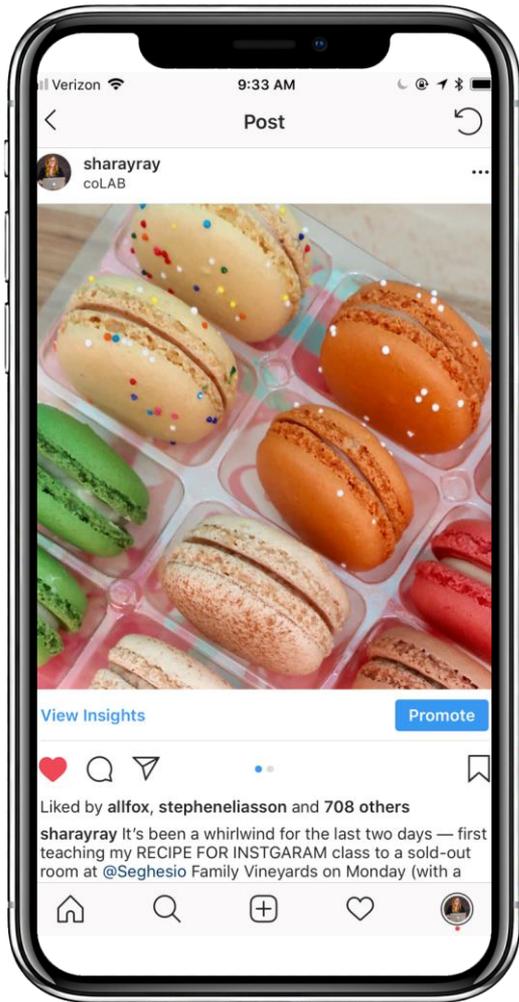
CLUB MEMBER



*Identify and target strong leads
and convert them into club
members*

BEST PRACTICES:

1. Segment through digital ads & targeted emails
2. Use video to show the lifestyle of members
3. Use video to show off your own team
4. Remember, connections first – everything else second



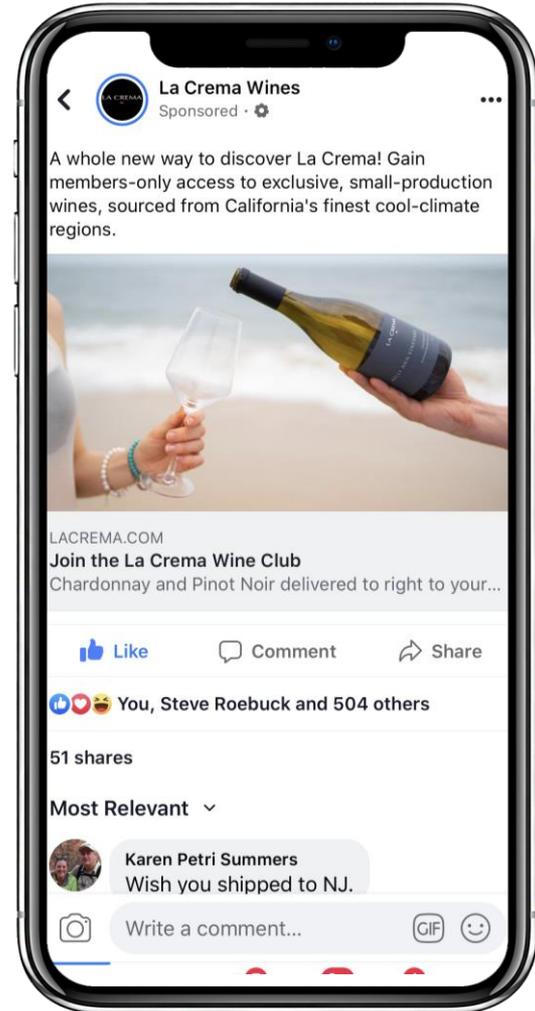
UTILIZE THE SAVE FEATURE:

1. Save wine club members to go back to connect
2. Save top brand advocates
3. Save posts with testimonials
4. Save content you want to reshare

Click the banner icon and create a new folder, or add to an existing one.

DIGITAL ADS

1. Run digital ads targeted at local customers encouraging them to come to events
2. Run digital ads targeted at top 100 customers with various features of your wine club (events, promos, videos of the wine club team)
3. Retargeting with top engagement posts





BEHIND THE SCENES FUN:

1. Create stories showcasing your wine club events
2. Develop videos from the wine club team

Where are you along the continuum?



STAGE 1

Awareness



STAGE 2

Interest &
Consideration



STAGE 3

Bottle
Purchase



STAGE 4

Repeat
Buyer



STAGE 5

Club Member

**The truth is: you are everything all the time.
But you should have FOCUS.**

Stage 1 to 2

AWARENESS towards CONSIDERATION



STAGE 1

Awareness



STAGE 2

Interest &
Consideration



How to know if this area needs focus?

Key Indicators:

1. Your database is small, or not reasonably expected to buy all your wine
2. Your database is mostly purchasers
3. Your purchasers have a high LTV
4. You have an expensive “front line” channel like a tasting room you need to “feed”
5. You have a new product/variatal/price point

Why You Should Always Have a Small % of Effort on Awareness (aka Scary stats)

- Databases decay at a rate of 2.1% per month or 22.5% a year*
- 30% of visitors to your tasting room won't purchase**
- Open rate on winery emails expected ~27%+
- Click through rate on winery emails expected ~6%+

A constant fresh flow of introduction to your brand will ensure a strong DTC program.

Example:

Goal = Find quality, not just quantity

| Objective | Target | % of Budget | Metric | Goal | Frequency |
|-----------------|---|---------------------------------|------------------------------------|---------------|--|
| Traffic Driving | LA locals that have indicated travel intent to wine country | 40% | # of Visitors; sku for tracking | TBD | Based on campaign or tasting room coordination |
| Awareness | Test: age, income, location, interests, lookalike, relationship | 60% for first 3 months then 20% | # of "Likes" | <\$1/like | Rotate Monthly |
| Lead Generation | Those who have Liked | 40% after 3 months | Sign ups to mailing list | <\$10/sign up | Rotate monthly |

Tips for Awareness - to - Consideration



Goal: Introduce yourself ... briefly and multiple times



Have your top 2-3 brand points nailed down



Test targets – geo, affinity, look-a-like



Content is crucial – keep it frequent,
authentic and introductory

Stories, history, people
Test for engagement



Consider separate landing pages for channels with information

Stage 2 to 3

CONSIDERATION towards FIRST PURCHASE



STAGE 2

Interest &
Consideration



STAGE 3

Bottle
Purchase



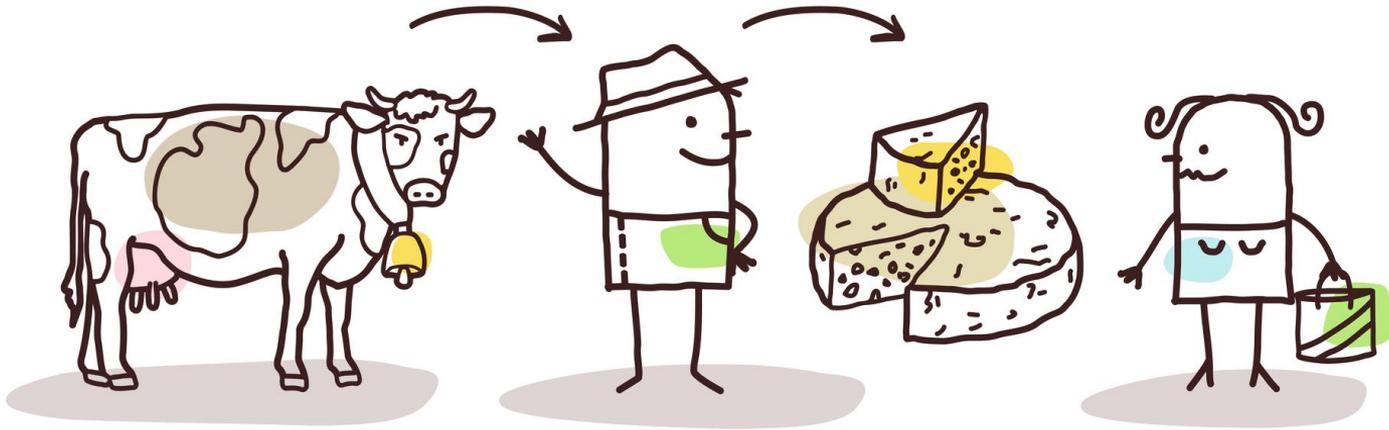
How to know if this area needs focus:

Key Indicators:

1. You have a large database but only a small percentage have purchased
2. Your single purchases are far in the past
3. You have a busy “front line” channel like a tasting room
4. Your predecessor, management, or colleagues focused mostly on awareness

Why This is the Most Common (and Most Overlooked) Stage

- We don't tend to segment by purchase frequency, so we don't keep this data top of mind.



Tips for Consideration - to - First Purchase



Goal: Trial



Reduce barriers to trial

Membership
Minimums
Shipping



Focus on best selling products (And tell them it's popular)



Include some information about the product



Thank them for first purchase

Stage 3 to 4

FIRST PURCHASE toward REPEAT BUYER



STAGE 3

Bottle
Purchase



STAGE 4

Repeat
Buyer



How to know if this area needs focus:

Key Indicators:

1. You have a large database but only a small percentage have purchased once or multiple times
2. You don't have a communication plan for non-club members

Tips for First - to - Repeat Buyer



Use the knowledge you have

(You know what they bought)



Build sales up gradually

(Good to know their AOV)



Remind them how to use your product



Remember to continue to provide value



Look out for creative interception points

Stage 4 to 5

REPEAT BUYER towards CLUB MEMBER



STAGE 4

Repeat
Buyer



STAGE 5

Club Member



How to know if this area needs focus:

Key Indicators:

1. Don't meet club sign up goals
2. Meet new sign up goals, but lose as many or more members each month
3. Start to see "lack of engagement" reasons for cancellations like "have too much wine"
4. Don't see orders outside of club shipments

Tips for Repeat Buyer - to - Club Member



Know what they value – it isn't your wine



Capture cancellation reasons



Periodically survey



Set signup and retention goals



Sales training for staff



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Awareness

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Buyer

STAGE 5

Club Member

Cost

Effort



Final Take-Aways



Simon: Speak to your customers based on their progress in the sales funnel and focus on how you can move them to the next stage.



Shana: Allow insights to guide your social media marketing... but.... Connections & excitement are worth more than a pretty picture.



Susan: Know your database – and review where you are every 6-12 months to see if you're moving in the right direction.