

The logo features the year '2022' in a vertical, grey, sans-serif font on the left. To its right is a circular emblem with a purple-to-red gradient, containing a white silhouette of a wine glass. Further right, the text 'DIRECT TO CONSUMER' is in a smaller, black, sans-serif font, and 'WINE SYMPOSIUM' is in a larger, black, serif font below it.

2022 DIRECT TO CONSUMER
WINE SYMPOSIUM

REQUEST FOR PROPOSAL: DTC WINE SYMPOSIUM 2022

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, case studies, data, and tangible ideas 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. This is the first time the DTCWS will be offered in two formats (digital and in-person), therefore, it is even more critical that our Workshop Sessions provide practical value to our registrants regardless of method of participation.

In 2021, we re-imagined the Symposium in a virtual format, reaching more attendees in more states than ever. For 2022, we are planning for an in-person conference, COVID-permitting, plus livestream presentations for our virtual participants. If COVID restrictions prevent an in-person conference, we will still conduct the conference virtually. Updates will be posted here:

<https://dctwinesymposium.com/covid/>

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 19-20, 2022, a \$725 value. In the event the Symposium is held 100% virtually due to the continuing pandemic, each speaker will receive one complimentary virtual registration, a \$200 value..
- One night accommodation at the Hilton Hotel in Concord, CA, a \$210 value, within the room block. *IMPORTANT: 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 2022 DTC Wine Symposium.

Important: 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. Workshop topics and speakers will be confirmed in early October.

REQUIREMENTS FOR PROPOSAL

- **Present your outline.**
Submit a written outline of your proposed content and be prepared to discuss it 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 their daily work. 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.**
Prepare a biography of 200 words or less. This will allow us to get to know you a little bit better and how your experiences could add value to the DTCWS.
- **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.
 - **Thursday, September 30, 2021: Proposal Submission Deadline**
 - *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.
 - Provide a list of previous speaking engagements you have participated in, including any webinars or digital conferences. Prior speaking sessions are not required to participate.

- 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 here: <https://forms.gle/4qynoNUbCGR7zadLA>
- **Monday, October 19, 2021: Speaker Confirmation Deadline.**
 - Speakers will be confirmed by the Workshop Committee.
 - Confirmed speakers must sign the Speaker Agreement and upload their bios/headshots to the event app.
- **October-December:** Workshop planning sessions (informal, via phone) will take place. Frequency, dates and times will 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 rehearsal/recording sessions is mandatory.** These will be scheduled digitally to provide real presentation practice and to create synergy among the group. Prior to these dates, your Workshop Session committee member will assist in preparation and casual practice sessions as needed.
 - Informal Rehearsal Date Window: **November 15-November 19, 2021.**
 - Formal Rehearsal Date Window: **November 30-December 7, 2021.** *PowerPoint encouraged if ready.*
 - Recording Date Window: **December 8-December 17, 2021.** *PowerPoint required (includes speaker headshots and titles, at a minimum, if the session has no other visual aids).*
 - **Pre-recorded session is in the event the in-person symposium is cancelled due to the pandemic, as well as for the benefit of post conference content access.**
 - Please note that DTCWS reserves the right to edit final recordings prior to broadcast.

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

- **Final PowerPoint presentations due by December 3, 2021.**
 - Moderators will consolidate speaker presentations into one complete PPT file (not pdf), proof/edit to ensure consistent formatting and proper use of DTCWS template, then submit to the appropriate Google Drive folder.

WORKSHOP SESSIONS

Our intended Workshop Session topics 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 new faces, 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.

Be Our Guest

While tasting rooms have had to heavily rely on reservations for the last two years--some for the first time--the debate over reservations vs. walk-ins has become top of mind. Which one really works best? Is there a hybrid model that works better? Join us for this discussion as we look at wineries who have tested these theories and share which has worked best for them.

- **COMMENTS:** Seeking speakers who are decision makers regarding winery visitation that can talk to their experience with both reservation and walk-in formats.
- **AUDIENCE:** DTC Manager, GM/Owner, TR Manager
- **CONTENT LEVEL:** Intermediate

Please submit speaker materials for this session to Brandon Allen at brandon@vanduzer.com.

Keeping it Compliant – Shipping Compliance in 2022

With states hungry for revenues and new laws being passed monthly, staying on top of compliance can be a full time job for wineries. Whether you are managing compliance yourself or utilizing software, now is the time to certify that you are at the top of your game. In this session, you'll learn best practices for wine shipping compliance, the areas that states are targeting for violations, and techniques to ensure proper compliance at all levels of your organization.

- **COMMENTS:** Seeking speakers who are well versed in compliance to discuss trends in state enforcement combined with useful data and best practices to avoid penalties and/or loss of permit.
- **AUDIENCE:** DTC Manager, GM/Owner
- **CONTENT LEVEL:** Intermediate

Please submit speaker materials for this session to Chris Grossman at cgrossman@montelena.com.

Staying Legal in a Digital World

As social media channels become more important communication platforms for consumer engagement and DTC sales, keeping your social media program both effective and legal are critical. In this annual update, we will explore legal questions, outline restrictions and recommend guidelines to help you and

your team stay legal online.

- **COMMENTS:** Seeking speakers who can speak to the ever evolving legal changes in social media promotion, with a focus on pandemic induces changes and whether or not they are here to stay.
- **AUDIENCE:** All Audiences
- **CONTENT LEVEL:** All Audiences

Please submit speaker materials for this session to Brandon Allen at brandon@vanduzer.com.

From Boomers to Millenials: How to entice membership across generations

When it comes to your brand image and wine club - are you marketing to your past or are you preparing for the future? Learn effective techniques to keep your loyal guests happy across all generations while broadening your scope to set yourself up for success in the future.

- **COMMENTS:** Seeking speakers who can share specific programs their wineries have executed that have resulted in enrollment membership across generations.
- **AUDIENCE:** DTC Managers, Wine Club Managers
- **CONTENT LEVEL:** Intermediate

Please submit speaker materials for this session to Nina Depiesse at ninar@longshadows.com.

Fully Booked: Techniques to Encourage Weekday Visitation

“Sorry, we are fully booked” is an oft repeated phrase when it comes to weekend customer requests. But how often is this phrase uttered by your staff on weekdays? Keep your staff pouring and the sales flowing all week long with new methods and strategies designed to entice customers to visit during off-peak periods.

- **COMMENTS:** Seeking speakers who have implemented successful initiatives to encourage off-peak visitation, supported by case studies combined with measurable results.
- **AUDIENCE:** DTC Managers, Tasting Room Managers
- **CONTENT LEVEL:** Beginner, Intermediate

Please submit speaker materials for this session to Kasey@coewine.com.

Message in a Bottle? Alternative ways to connect with your customers

It’s a common theme for all of us - a full inbox of unwanted or overlooked emails. So, how do we connect with our guests in a way that makes an impact? In this session, learn from proven cases about different ways to reach out and be seen by your guests via non-traditional or less common ways of communication. Who knew in the age of advanced technology going back to the basics may just be your ticket to more engagement?!

- **COMMENTS:** Seeking speakers experienced with DTC marketing in a variety of formats. Speaker does not have to work for a winery, but instead can share specific examples of alternative methods of outreach with measurable impact and data driven results.
- **AUDIENCE:** DTC Managers, Wine Club Managers, Marketing Team, Owners

- **CONTENT LEVEL:** Intermediate

Please submit speaker materials for this session to Nina Depiesse at ninar@longshadows.com.

Sideshow or Mainstay - Virtual Tastings: Are they here to stay?

2020 changed how wineries interacted with their members and customers. One by-product of this was virtual tastings. Now that your winery has opened back up, and with potential uncertainty with Covid-19 variants, should you continue doing virtual tastings? Yes! This session will highlight tips on how to start or continue to incorporate virtual tastings into your revenue stream and use them as a retention tool for wine club members.

- **COMMENTS:** Seeking speakers who are not only well-versed in virtual experiences, but have incorporated this format into their daily operation and have examples of how they have developed this channel with a goal of continued growth.
- **AUDIENCE:** Tasting Room Managers, DTC Managers
- **CONTENT LEVEL:** Beginner/Intermediate

Please submit speaker materials for this session to Patricia O'Brien at p.obrien@danzadelsolwinery.com.

The DTC vs. Wholesale Tug of War: Techniques for a Balanced and Successful Approach

A balanced approach between DTC and wholesale can be pivotal to a winery's business plan. DTC often delivers higher margins combined with greater per customer purchase volume and frequency, while wholesale can allow wine to be more accessible to potential new customers. But friction can occur, often resulting in cannibalization of DTC sales opportunities. This session will focus on techniques to help create balance between these two segments of your business, with a focus on DTC customer retention.

- **COMMENTS:** Seeking speakers who can speak to both wholesale and DTC channels, with the ability to cite examples or case studies where these two facets of a brand's business plan can exist harmoniously. Tactics should be focused on how to help DTC and wholesale work together; examples of how proper management can help wholesale grow DTC, as well as examples of how brands can structure their DTC program to prevent cannibalization of their membership program via wholesale.
- **AUDIENCE:** DTC Managers, DTC Marketing Coordinators, Owner/GM, E-Commerce Manager
- **CONTENT LEVEL:** Intermediate, Advanced

Please submit speaker materials for this session to Chris Grossman at cgrossman@montelena.com.

The Art of Brand Storytelling

In an age where everyone is focused on creating their brand, how many are actually effective in creating a connection with the general consumer. By looking at your brand story, you can create a humanizing

narrative your customers can relate to, and generate distinction from the competition. In this session we will look at wineries who have succeeded in telling their brand story consistently, and how it has improved their marketing efforts company wide.

- **COMMENTS:** Seeking speakers who are marketing managers or coordinators that can speak to development of brand storytelling.
- **AUDIENCE:** Owner/GM, DTC Manager, Marketing Manager, E-Commerce Manager
- **CONTENT LEVEL:** Intermediate / Advanced

Please submit speaker materials for this session to Brandon Allen at brandon@vanduzer.com.

Strike it Rich! Utilizing your existing database as your winery's goldmine

Capturing data from incoming guests is one thing but are you missing the mark by not utilizing that information to its full potential? From segmentation to value added emails (and everything in between), in this back to basics session we'll reveal tips and tricks from a panel of experts on how to use the information you already have to create a healthy database that works for you.

- **COMMENTS:** Seeking speakers who have experience with data collection and analysis, as well as how this data can be put to work to achieve a variety of goals -- from visitation, membership/allocation, and wine sales.
- **AUDIENCE:** DTC Managers, Wine Club Managers, Marketing Team
- **CONTENT LEVEL:** Beginner/Intermediate

Please submit speaker materials for this session to Nina Depiesse at ninar@longshadows.com.

Lean & Mean: Social Media Strategies

Social media can be an overwhelming task for a small or medium size winery, but it doesn't have to be. Creating an online presence that is an extension of your brand can greatly impact your business through heightened awareness, as well as drive visitation and DTC sales. This session will focus on proven tips and how-tos that you can implement immediately to improve your conversion rates without breaking the bank.

- **COMMENTS:** Seeking speakers with marketing experience and ability to share best practices for a marketing program with a small team. Speakers should be able to share examples and case studies which detail successful approaches, as well as tools that can prove helpful to teams with limited resources.
- **AUDIENCE:** DTC Marketing Coordinators, Tasting Room Managers, Supervisors
- **CONTENT LEVEL:** Beginner/Intermediate

Please submit speaker materials for this session to Patricia O'Brien at p.obrien@danzadelsolwinery.com.

What's Your Digital & E-commerce Strategy?

Finding avenues to increase brand awareness through digital channels, from social media to online advertising and email marketing, is crucial for wineries to grow sales. What are you currently doing to improve this channel? Join a panel of wine industry marketing experts as they provide you with proven methods on how to build your digital advertising strategy.

- **COMMENTS:** Seeking speakers with out of the box styles of creating a welcoming atmosphere, anticipating and fulfilling needs, as well as data on case studies on the topic.
- **AUDIENCE:** DTC Managers, DTC Marketing Coordinators
- **CONTENT LEVEL:** Intermediate

Please submit speaker materials for this session to Kasey Helt at kasey@coewine.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.